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**Year End Tax Checklist - Businesses**

Here is a **checklist of what we must receive**from you to complete your business tax return. We must **receive your information by February 10th** in order to process your return by the March 15th deadline. We will**automatically file a 6 month extension**for you if we have not received your information by February 10th.

* **December & January Bank & Credit Card Statements** - If you don't have online banking, then we'll need printed year end statements for all business related cards and accounts.
* **QuickBooks Accountant's Copy or Small Business Planner**- If you do not use QuickBooks, fill out our Small Business Planner under "Accounting Tools" at kfreemanfinancial.com.
* **Business Loan, Note, & Lines of Credit Year-End Statements**- We need the outstanding balances of these loans and your interest paid throughout the year.
* **Quarterly and Annual Payroll Tax Reports -**941, 940, TWC, W-3, and 1096 reports, Form 1099's, and Form W-2's. Also, providing your EFTPS login if you do payroll yourself will help us reconcile your information.
* **Invoices of New Asset Purchases**- Anything purchased over $2,500 except small tools.
* **Business Vehicle Mileage**- Use our free worksheet to submit by downloading the "Small Business Planner" under "Accounting Tools" at kfreemanfinancial.com

**Reminder – QuickBooks Users**

* **QuickBooks Accountant's Copy -**
* We support all versions between 2012 - 2016 to transfer data using the accountant's copy feature.  You can email or drop off a USB of this file and we can make adjusting entries to automatically upload back into your financials. **Remember: Do not undo your dividing date restriction once you send us your Accountant's Copy.**
* **LogMeIn Capability -**We can access and make adjustments to your financials by logging into your work computer at no charge to you. Call us to set this free feature up in time for tax season.
* **QuickBooks Online Users -**Please send us an Accountant's Invitation under your account options for your QuickBooks online account. Call us for any help with this feature.