

Business Information

- Prior Year's Business Tax Return
- Article of Incorporation
- Partnership Agreement
- Accounting Records
- Bank Statements
- Credit Card Statements
- Payroll Reports
- Detail of Asset Purchases
- Depreciation Schedules
- Detail of Asset Dispositions
- Vehicle Information

Income

- Gross Receipts from Sales or Services
- Sales Records (for accrual based taxpayers)
- Inventory (if applicable)
 - Beginning Inventory
 - Inventory Purchases
 - Ending Inventory
 - Items Removed for Personal Purposes
- Returns and Allowances
- Business Checking/Savings Account Interest (1099-INT statement)
- Other Income

Expenses

- Advertising
- Transportation and Travel
 - Local Transportation
 - Business Trip (mileage) Log
 - Public Transportation, Parking, Tolls
 - Travel Away from Home
 - Airfare or Mileage
 - Hotel
 - Meals
 - Taxi
 - Internet Connection
 - Other
- Fees Paid to Subcontractors (1099-MISC or 1096)
- Asset Depreciation
 - Cost and Acquisition Date of Assets
 - Sale Price and Disposition Date of Any Assets Sold

- Fringe Benefits (Employer-Paid)
 - Pension/Profit Sharing Contributions
 - HAS Contributions
 - Health Insurance Premiums
 - Other Fringe Benefits
- Business Insurance
- Interest Expense (Mortgage/Loan)
- Legal Fees
- Office Supplies
- Rent Expense
- Office-in-Home
 - Square Footage of Office Space
 - Total Square Footage of Home
 - Mortgage Interest or Rent Paid
 - Utilities
- Wages Paid to Employees
 - Form W2 and W3
 - Federal and State Payroll Returns (Form 940)
- Other Expenses