

Small business tax preparation checklist

Expense records	Identification information	
<input type="checkbox"/> Receipts <input type="checkbox"/> Bills <input type="checkbox"/> Credit card statements	<input type="checkbox"/> Social Security number (SSN) <input type="checkbox"/> Employer Identification Number (EIN) <input type="checkbox"/> Driver's license (ID)	
Financial statement	Investment Information	Financial statement
<input type="checkbox"/> Cash flow statement <input type="checkbox"/> Balance sheet <input type="checkbox"/> Income statement <input type="checkbox"/> Profit & loss report	<input type="checkbox"/> Stocks <input type="checkbox"/> Bonds <input type="checkbox"/> Real estate <input type="checkbox"/> Cryptocurrency	<input type="checkbox"/> Bank statements <input type="checkbox"/> Deposit slips <input type="checkbox"/> Sales invoices
Payroll information	Inventory information	Property records
<input type="checkbox"/> W-2s <input type="checkbox"/> W-3s <input type="checkbox"/> 1099-MISCs	<input type="checkbox"/> Amount of inventory <input type="checkbox"/> Cost of goods sold (COGS)	<input type="checkbox"/> Mortgage interest <input type="checkbox"/> Property taxes
Relevant tax forms	Capital-asset activity	
<input type="checkbox"/> Schedule C <input type="checkbox"/> Form 1120 <input type="checkbox"/> Form 1065 <input type="checkbox"/> Form 1040-ES <input type="checkbox"/> Schedule K-1 <input type="checkbox"/> Last year's tax return	<input type="checkbox"/> Equipment <input type="checkbox"/> Copyrights <input type="checkbox"/> Land <input type="checkbox"/> Buildings <input type="checkbox"/> Patents <input type="checkbox"/> Vehicles <input type="checkbox"/> Trademarks	
Business loan information	Potential deductions	
<input type="checkbox"/> Business loan invoices <input type="checkbox"/> Funding receipts <input type="checkbox"/> Accrued interest statements	<input type="checkbox"/> Home office expenses <input type="checkbox"/> Business vehicle mileage log <input type="checkbox"/> Business travel expenses <input type="checkbox"/> Charity contributions	