I'm A Small Business Owner

Document Collection

- ◯ **Company Identification:** Have your business's EIN (Employer Identification Number) ready.
- ◯ **Business Structure Documents:** Include documents related to your S-Corp status.
- ◯ **Bank Statements:** For tracking business income and expenses.
- ◯ **Income Records:** Document all business income including invoices and sales records.
- ◯ **Expense Receipts:** Collect all receipts for business-related expenses, such as office supplies, utilities, and services.
- ◯ **Payroll Records:** If you have employees, include all payroll documentation.
- ◯ **Office or Property Leases:** Copies of any lease agreements for business property.
- ◯ **Equipment Purchases**: Records of equipment or property bought for business use.
- ◯ **Loan Agreements:** Any loan documents, if applicable to the business.
- ◯ **Insurance Payments:** Records of payments for business insurance.

Taxpayer Intake Forms

Complete the Intake Form: Access the Form

Mobile App for Convenience:

- **Android:** Google Play
- **iOS:** App Store

Extra Forms

- ◯ **Are You a Student?** Include 1098-T for tuition, 1098-E for student loan interest.
- ◯ **Household Employer?** Access the Form
- ◯ **Provided Household Help?** Access the Form
- ◯ **Have Dependents in Someone's Care?** Complete the Dependent Care Form for deductions.

Notes

Don't forget to share our services with your friends and family. Ask us about our referral program and get $75 per referral!

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