

C Corp, S Corp, Partnership, or self-employed Sch C Tax Return Preparation Checklist

Company Name: _____

Entity Type: C Corp S Corp Partnership Sch C

Tax Year: _____

Prior 3 Tax Returns Filed: Please include copies only of the tax returns listed below, both Federal and State
 _____ _____ _____

	Federal		State	
	Date Paid	Amount Paid	Date Paid	Amount Paid
<input type="checkbox"/> 1st Qtr - due 04/15				
<input type="checkbox"/> 2nd Qtr - due 06/15				
<input type="checkbox"/> 3rd Qtr - due 09/15				
<input type="checkbox"/> 4th Qtr - due 01/15				

Please include copies of checks or bank statements showing payments made

Please check all that apply, include all documentation, IRS documents must be originals, not copies

- Forms:**
- 1099-MISC Miscellaneous Income (income received or payments made)
 - 1099-INT Interest Income
 - 1099-DIV Dividend Income
 - 1099-B Sales of Stock
 - 1099-K Merchant Card and Third Party Network Payments
 - 1098 Mortgage Interest

- Other Documentation:**
- Property Taxes - Real Estate & Vehicle
 - Charitable Contributions (must have receipt from organization or check)

- Business Inc & Exp:**
- Gross Receipts / Sales / Rental Property Income / 1099-MISC
 - Expense Receipts / Cost of Goods Sold
 - Home Offices Expenses (self-employed Sch C only)
 - Mileage Records / Total Miles Driven & Business Miles Driven / Auto Expenses (Sch C only)

- Additional Information:**
- Purchase or Sale of Real Estate (will need HUD Closing Statement)
 - Purchase or Sale of Vehicle (will need invoice)

- Financial Statements:**
- December Bank Statements for all Checking & Savings Accounts
 - December Credit Card Statements
 - December Loan Statements including Amortization Schedule
 - Owner Contributions or Owner Distributions for year
 - W-3 / W-2 - Employee Wages
 - Quarterly Payroll Reports to include 941, 940, NC-3 or NC-5, NCUI-101
 - 1099-MISC - Rents Paid / SubContractor Payments
 - end of year Quicken or Quickbooks backup file
 - furniture & fixtures, machinery & equipment, computer, & leasehold improvements
must have invoice or receipt for purchase of a depreciable asset