

What to bring to your appointment? – (Business or Fiduciary)

- Copy of the entity's governing documents (article of incorporation, article of association, partnership agreement, trust deed, declaration, operating agreement...)
- Copy of the S-election approval letter (if any)
- Copy of the letter showing the Federal and State Employer identification numbers - EIN and SEIN (if any)
- Name, Address, SSN and ownership percentage for each shareholder/partner/member
- Backup of QuickBooks or Profit&Loss and Balance Sheet statements (if any)
- Bank Statements (including credits cards, if applicable) reconciled as of 12/31
- Payroll Records (if any)
- Copy of Federal and State Tax Returns for the last 2 years (if any)
- All your questions and concerns