



Quickbooks Users Should Complete This Side of the Form



2020 Business Checklist

N/A Included

- QuickBooks *portable* backup emailed to us at cpa@corwinjenkins.com or put on a flash drive
- QuickBooks password if you have one _____
- Documents for any new bank loans obtained during the year
- Year-end payroll report from your payroll provider (unless we do your payroll)
- Copies of invoices over \$2,500 for major improvements, furniture, machinery & equipment, and/or all vehicle purchases or trade-ins
- Any 1099s you received from customers and/or 1099-Ks you received from your credit card processing company
- Copies of December 2020 bank statements
- Copies of December 2020 and January 2021 credit card statements
- Copies of December 2020 loan statements with payoff balances
- Signed and dated 2020 Engagement letter (enclosed)
- Other information unique to your business

Non Quickbooks Users Should
Complete the Other Side of this Form

Non-Quickbooks Users Should Complete This Side of the Form

2020 Business Checklist

If you do NOT use Quickbooks for your bookkeeping, here is a list of things we need from you so we may prepare your business tax returns:

N/A Included

- Check stubs for the entire 2020 year so we can tally your results
- Documents for any new bank loans obtained during the year
- Year-end payroll report from your payroll provider (unless we do your payroll)
- Copies of invoices over \$2,500 for major improvements, furniture, machinery & equipment, and/or all vehicle purchases or trade-ins
- Any 1099s you received from customers and/or 1099-Ks you received from your credit card processing company
- January 2020 to December 2020 bank statements (12 months worth)
- January 2020 to January 2021 credit card statements (13 months worth)
- January 2020 to December 2020 loan statements (12 months worth)
- Signed and dated 2020 Engagement letter (enclosed)
- Other information unique to your business

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