



Current Company Information

* Please make additional copies of this form and fill out separately for each company.
* If we have prepared your Business Income Tax Returns previously, please ONLY provide any information below that may have changed over the past year- Thank you.

Company Name: _____

Contact Name(s): _____

Physical Address: _____

City: _____ State: _____ Zip Code: _____

Mailing Address: _____

City: _____ State: _____ Zip Code: _____

Phone numbers: Home: _____ Cell: _____

Business: _____ Fax: _____

Email Address: _____

Business Start Date: _____ Federal EIN: _____

Type of Entity: Partnership (1065) S Corporation (1120S) C Corporation (1120)

Manager: _____ DOB: _____ SS#: _____ DL#: _____

Manager: _____ DOB: _____ SS#: _____ DL#: _____

President: _____ DOB: _____ SS #: _____ DL #: _____

Vice President: _____ DOB: _____ SS #: _____ DL #: _____

Secretary: _____ DOB: _____ SS #: _____ DL #: _____

Treasurer: _____ DOB: _____ SS #: _____ DL #: _____

Additional information that we need to discuss regarding changes in ownership or states in which you were doing business over the past year and since filing your last tax returns:



Taylor Hill
Enrolled Agent: 00134684-EA | LTC 35289-C
22450 SW Washington St. | Sherwood | OR | 97140
Phone 503.679.0965 | Fax 877-868-3810

Items needed for 2020 Business Income Tax Return

Please provide **photocopies** of the following information for us to complete your 2020 Income Tax Return. **Please do not send the originals to us.** We ask that you retain the originals in a safe place in your possession in case questions arise or further information is needed from them in the future.

- 1) Financial Statements (Income Statement and Balance Sheet) as of December 31, 2020. These statements should tie to your beginning balances as of January 1, 2020 and your last year's tax return if one was filed. Also, all of your bank statements should be reconciled and your bank balances accurate as of December 31, 2020. If you are unable to provide this information our accounting staff is willing and able to assist with this process. Please be aware, though, that there are additional charges incurred for these bookkeeping services.
- 2) Any closing statements (HUD-1) for real estate and rental properties purchased during the year.
- 3) Interest statements and mortgage balances for any loans as of December 31, 2020. Please include escrow account activity and balances.
- 4) Beginning balance, interest rate, term, and payment amount for any other loans your business has and the assets that are associated with them.
- 5) Please note any changes in business address, business ownership, address changes on present owners and contact information.
- 6) Property management statements regarding income and expenses in connection with your rental properties.
- 7) Complete information on any assets purchased or sold during the year of 2020.
- 8) If your business was formed prior to 2020 and we did not prepare your 2019 business tax return(s) please provide a copy of the last two years returns (2018 & 2019).
- 9) A signed engagement letter and a client information form. We cannot begin processing your information until all of the information in item nine is received.
- 10) If this is your first year working with us, please send copies of Legal Documents; including the Stamped Articles and Operating Agreement, disclosing owners and percentage of ownership, IRS EIN Letter, and S-Election/2553 if applicable.

Just for informational purposes, if you are using QuickBooks as your accounting software program, we would recommend that you create an accountant copy of the file and e-mail or send a copy of that file with your records to our office. This may save some potential questions we may have on the other information that you provide us.

Thank you for allowing us to assist you in this process.