



2023 Business Tax Preparation Checklist*

- Changes to business or personal name/address/email/phone.
- Changes to ownership or structure.
- Copies of W-2s/1099s sent to employees/contractors (if not prepared by us).
- Payroll tax credits taken on Forms 941, if any (provide copies of all applicable quarters).
- Health insurance amounts paid; differentiate personal or business payment.
- SBA Disaster Loan status of repayment.
- Loan history for existing SBA-backed loans (pre-February 2020).
- New assets purchased (bill of sale, or proof of date, amount paid and description of items).
- Sale or purchase of real estate (provide closing documents on purchase, sale and any improvements made).
- Other amounts paid for business expenses. Please include Home Office or Mileage figures.
- HSA contributions made (or to be made).
- Retirement plan contributions made (or to be made).
- Amount of any contributions of personal funds to the business.
- Business items donated to charity.
- Balance on all business loans and credit cards as of December 31, 2023, plus interest and fees paid.
- Inventory cost balance as of December 31, 2023, if applicable.

**This list not inclusive. If you have any questions, please contact us.*