

Bookkeeping Services Checklist

Contact Information

Owner Name..... Phone #

Mailing Address

e-mail..... Cell

COMPANY INFORMATION

Legal Name..... FEIN

Physical Address, if different

This business is a sole proprietorship LLC S-Corporation C-Corporation

Industry Employees? Y/N

Last year filed..... Form 1120S 1120 1065 Sched. C. Initial return Final return

I've attached a profit & loss statement and balance sheet I will put together income/expenses

I will drop off everything and you sort it out I have no data and no idea where to start

I need an extension Guidance per email personal appointment S-corporation application

I have attached the names, addresses and social security numbers of every principal in my company together with their share of ownership

Comments

.....

With my signature I warrant that all information given is true and accurate.

I want my tax return prepared and will pick it up in person want it emailed want it snail mailed

I paid \$..... down and will pay the balance COD

I will pay the invoice check Cash Paypal Zelle Credit Card Square Invoice

Signature Date