



New Business Onboarding Document Checklist

Here's a list of the documents required to begin your journey as a new business client. Once you've obtained all the required materials, you can upload them to our secure online portal ([link](#)) to ensure a safe and convenient submission.

TAX RETURN SPECIFIC DOCUMENTS

Please gather and submit these required documents

- EIN Verification and IRS Entity Acceptance Letters (147C and/or SS-4 and/or CP261 if applicable)
- Copies of last three years of corporate tax returns
- Copies of last three years of individual tax returns
- Deprecation Schedule
- Applicable business credits
- Net Operating Loss Carry Forward (if applicable)
- Articles of Incorporation
- Operating Agreement (Partnerships)

ADDITIONAL TAX SERVICES

We also provide assistance with business-related rental properties. Please indicate any services you are interested in and include a copy of your previous filings with your documentation.

- Personal Property Tax Declaration
- Income and Expense Reporting – Rentals

BUSINESS CONSULTING OPTIONS

Additionally, we offer business consulting and other services in a variety of key areas. Please indicate any areas you are interested in to learn more about.

- Succession Planning
- Business Expansion
- Accounting and Bookkeeping
- Retirement Planning
- Representation
- Other: _____