Providing Virtual Tax and Small Business
Solutions with concierge level care.

Business Tax Filing Checklist

Provide the following documents and information to ensure accurate and timely preparation of your personal tax return.

Upload all relevant tax documents to your existing portal account or go to our website to sign up for a portal account.

General Business Information

- Business name, address, and contact information
- Federal Employer Identification Number (EIN)
- State Tax ID (if applicable)
- Business entity type (e.g., LLC, S-Corp, C-Corp, Partnership, Sole Proprietor)
- Business formation documents (e.g., Articles of Incorporation/Organization)
- Prior year's tax return

Income Documentation

- Bank statements (business checking/savings accounts)
- Income records (e.g., sales, receipts, invoices)
- Form 1099-NEC/MISC/K (for payments received)
- Interest income statements (Form 1099-INT or similar)
- Rental income records (if applicable)

Expense Documentation

- Receipts for all business-related expenses
- Rent or lease payments (office space, equipment)
- Utility bills (electricity, internet, phone)

- Advertising and marketing expenses
- Professional fees (e.g., legal, accounting)
- Employee salaries and benefits
- Contractor payments (including Forms 1099 issued)
- Travel, meal, and entertainment expenses (with supporting documentation)
- Vehicle expenses (mileage logs or actual expense records).

Assets and Depreciation

- List of business assets (purchased, sold, or disposed during the year)
- Purchase date, price, and documentation for new equipment or property
- Depreciation schedules from previous years

Inventory (if applicable)

- Inventory valuation at the beginning and end of the year
- Cost of goods sold (COGS) calculation and records

Tax Documents

- Estimated tax payments made (dates and amounts)
- Payroll tax filings (Forms 940, 941, W-2, W-3)
- Sales tax filings (if applicable)
- Property tax payments for business assets

Loan and Financing Records

- Loan agreements and repayment schedules
- Interest paid on business loans (Form 1098 or equivalent)
- Line of credit statements

Additional Documentation

- Home office deduction details (if applicable): square footage of home vs. office space, utility bills, and insurance
- Health insurance premiums paid for employees or self
- Retirement contributions (e.g., SEP IRA, SIMPLE IRA)
- Details on any grants or government assistance received (e.g., PPP loan forgiveness documents)
- Any correspondence from the IRS or state tax authorities

Tips for Submission

- Organize documents digitally or in labeled folders.
- Highlight any significant changes from the previous year (new hires, new locations, etc.).
- Provide your tax preparer with contact information for questions or clarifications.

This checklist ensures your tax preparer has all the necessary information to file accurately and efficiently.

Contact Us Today

Jet Tax Service Corp
Jet Tax Business Services Corp
O: 954-667-0855
C: 786-369-9058
E: Info@JetTaxServiceCorp.com
W: www.JetTaxServiceCorp.com