**Business Data Sheet**

**Business Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_EIN#\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**How is your business structured? (Partnership, S-Corp LLC etc.) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Tell us how to access your accounting records by checking the appropriate solution below:

QuickBooks Desktop backup enclosed. (Username: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Password: \_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_)

QuickBooks Online. (Username: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Password: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_)

Other (records are enclosed)

* Bank Statements. For the year for all accounts.
* Credit Card Statements. For the year for all credit cards.
* Loan agreements with amortization schedule if applicable.
* Asset purchases for the year.
* Prior Year Tax Returns – 2 years of returns for new clients only.
* 1099 Forms Received
* Any other relevant documents: Please note, this may not be an all-inclusive list of items needed. More information may be required to prepare the return.

1. Do you provide service(s) or deliver product(s) in states other than Pennsylvania? **YES NO**
2. Did you acquire any new assets or equipment greater than $2,500? **YES NO**
3. Did you make any payments that would require you to file Form(s) 1099? **YES NO**

If yes, did you file or will you file all required Form(s) 1099? (Due Jan 31) **YES NO**

1. Please provide us with all Form(s) 1099-K received.
2. Did you purchase health insurance for your employees? **YES NO**

**Additional Documentation (physical documents or original receipts) may be required If there is no computer system of accounting or a summary spreadsheet of revenue and expenses.**

To the best of my knowledge, the above information is true and correct.

Signature: Date:

Title:

Notes/Questions\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**\*\* Additional fees (at our discretion) at $150 an hour rate will be charged if we have to sort/compile data, receipts, etc.**