



Tax Planning Checklist for Business Owners

Items needed to complete an accurate tax projection:

	Up-to-date Profit and Loss Statement for business or QuickBooks access
	Ensure your books are reconciled and up-to-date
	YTD Paystubs for taxpayer and spouse
	Total of estimated payments made so far for the year
	List of any major assets purchased for your business
	Total business miles put on your vehicle for the year
	List of any other major tax changes from prior tax year and questions you have
*	Major changes: Sold home, had a new baby, took funds from retirement account, etc.

Questions for Meeting:

Final Result of Tax Projection and Recommendations: