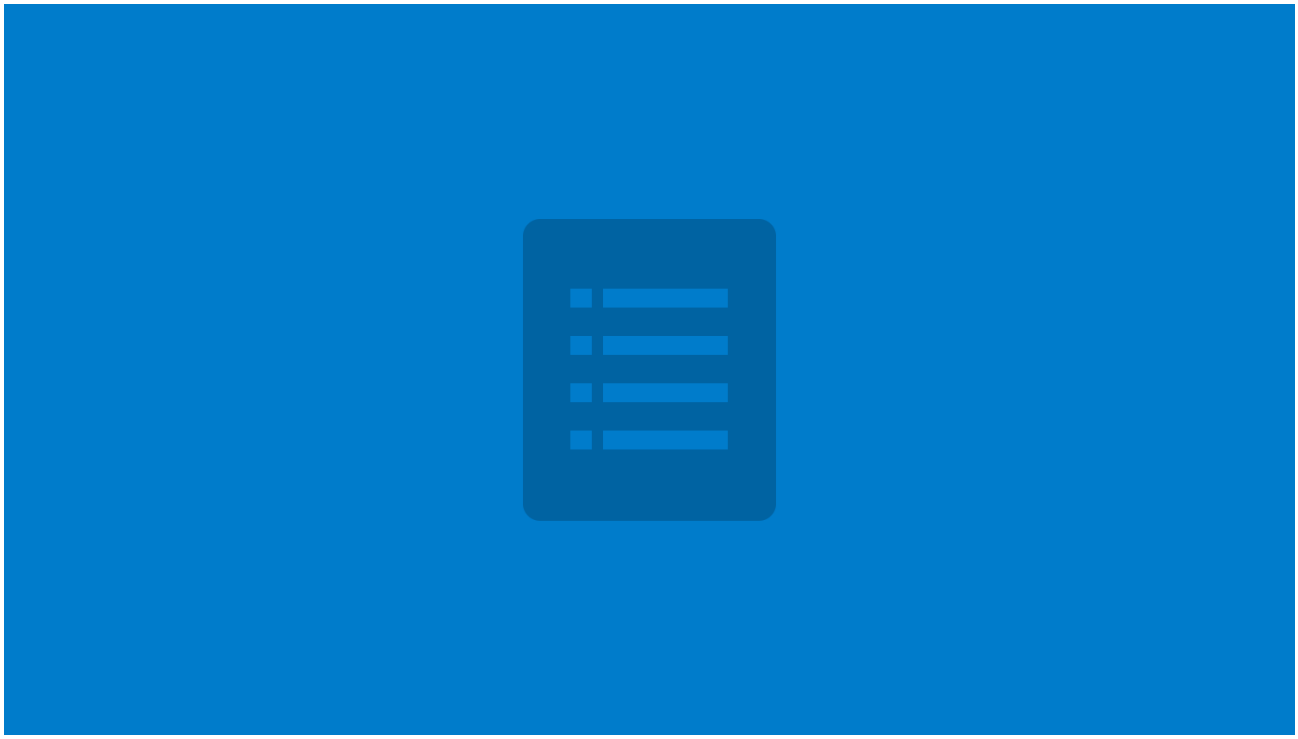
Small Business Tax Preparation Checklist

A free checklist you can copy, save, print or download as a PDF for free. Make your life easier by making sure your small business is ready for tax season.



- [ ] 1. Meet with your bookkeeper.
- [ ] 2. Update your mileage log.
- [ ] 3. Gather your bank statements.
- [ ] 4. Capture all expenses you have paid for out of pocket.
- [ ] 5. Make sure all personal expenses paid for from your business accounts are properly recorded.
- [ ] 6. Gather any 1099s you have received, including 1099-Ks from credit card processors.
- [ ] 7. Make sure you have issued 1099s as appropriate.
- [ ] 8. Pull receipts for asset purchases.
- [ ] 9. Ensure your loan balances match what is on your balance sheet.
- [ ] 10. Make sure your meals expenses are properly categorized.
- [ ] 11. Note any changes in ownership.
- [ ] 12. Schedule a pre-appointment call with your tax preparer.

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