



STRATEGY. CLARITY. RESULTS.

BUSINESS TAX PREPARATION CLIENT CHECKLIST

For C Corporations, S Corporations & LLCs

Tax Year:

Business Name:

Contact:

Phone / Email:

ENTITY TYPE / TAX CLASSIFICATION

- | | | |
|--|---|-----------------------------------|
| ☐ C Corporation | ☐ S Corporation | ☐ LLC |
| ☐ Single-Member LLC | ☐ Multi-Member LLC | ☐ Not Sure |

IMPORTANT - SECURE DOCUMENT SUBMISSION

Upload all tax documents, accounting records, bank statements, payroll reports and supporting information through FLL Business Solution Corp.'s encrypted client platform:

<https://fllbusiness.com/clients>

Do not send confidential information through unsecured email or regular text messaging.

1. BUSINESS & LEGAL INFORMATION

- | | |
|---|--|
| ☐ EIN letter / IRS notice | ☐ Articles of Incorporation / Organization |
| ☐ Bylaws or Operating Agreement | ☐ Current business address |
| ☐ Owner / shareholder / member information | ☐ Ownership percentages |
| ☐ Ownership changes during the year | ☐ Prior-year business tax return |
| ☐ IRS / state notices, if any | ☐ State annual report / registration, if applicable |

2. ACCOUNTING & FINANCIAL RECORDS

- | | |
|---|--|
| ☐ Year-end Profit & Loss Statement | ☐ Year-end Balance Sheet |
| ☐ General Ledger / Trial Balance | ☐ Business bank statements |
| ☐ Business credit card statements | ☐ Loan / line of credit statements |
| ☐ Accounts Receivable, if applicable | ☐ Accounts Payable, if applicable |
| ☐ Inventory records, if applicable | ☐ Merchant processor reports / 1099-K |

3. BUSINESS INCOME & EXPENSES

- | | |
|---|--|
| ☐ Gross sales / service income | ☐ 1099-NEC / 1099-MISC received |
| ☐ 1099-K received | ☐ Cash / other business income |
| ☐ Advertising / marketing | ☐ Contract labor |
| ☐ Insurance | ☐ Legal / professional fees |
| ☐ Payroll / payroll taxes | ☐ Rent / lease |
| ☐ Repairs / maintenance | ☐ Supplies / office expenses |
| ☐ Taxes / licenses | ☐ Telephone / internet |
| ☐ Travel / business meals | ☐ Utilities / other expenses |

4. PAYROLL, OWNERS & CONTRACTORS

- | | |
|--|--|
| ☐ Payroll reports | ☐ W-2 / W-3 |
| ☐ Forms 941 / 940 | ☐ State payroll reports |
| ☐ Owner / officer compensation | ☐ Owner contributions |
| ☐ Owner distributions / withdrawals | ☐ Loans from owner / shareholder / member |
| ☐ Loans to owner / shareholder / member | ☐ Independent contractors |
| ☐ Forms W-9 | ☐ Forms 1099 issued, if applicable |

5. VEHICLES, ASSETS & DEBT

- | | |
|---|---|
| ☐ Business vehicle information | ☐ Business mileage / vehicle expenses |
| ☐ New equipment / computers / furniture | ☐ New vehicles / machinery |
| ☐ Assets sold or traded during the year | ☐ Purchase date and cost of new assets |
| ☐ Business-use percentage, if applicable | ☐ Business loans / lines of credit |
| ☐ Year-end loan balances | ☐ Personal expenses paid by the business |

6. SPECIAL BUSINESS ACTIVITY

- | | |
|---|---|
| ☐ Sales or operations in another state | ☐ Employees in another state |
| ☐ Property in another state | ☐ Foreign income or transactions |
| ☐ Foreign bank accounts / assets | ☐ Foreign owner / shareholder / member |
| ☐ Digital assets / cryptocurrency | ☐ Business acquisition or sale |
| ☐ Related-party transactions | ☐ None of the above |

Details: _____

7. FINAL CLIENT CHECK

- | | |
|---|--|
| ☐ All business income reported | ☐ All bank accounts included |
| ☐ All credit cards included | ☐ All loans reported |
| ☐ All assets purchased / sold reported | ☐ Owner transactions reported |
| ☐ Payroll information complete | ☐ Contractor information complete |
| ☐ All required documents uploaded | ☐ Missing items identified |

CLIENT CERTIFICATION

I certify that the information and documents provided to FLL Business Solution Corp. are complete and accurate to the best of my knowledge. I understand that I'm responsible for providing complete information regarding the business's income, expenses, payroll, ownership, assets, liabilities and other transactions necessary for tax preparation. Additional information may be requested based on the entity's tax classification and business activity.

Authorized Representative: _____ **Date:** _____

Signature: _____ **Title:** _____

CONFIDENTIALITY & SECURE-SUBMISSION NOTICE

Upload all confidential and supporting documents through <https://fllbusiness.com/clients>. Do not send EINs, SSNs, payroll records, bank information, tax returns, identification documents or other sensitive records through unsecured email or text.

This checklist is an organizational tool and does not replace any official IRS, state or local government form.

FLL Business Solution Corp. | Form No. FLL-BUS-CLIENT-CHK-001 | Version: August 2026