



**2018 Business Tax Checklist**  
**Tax Return Deadline**  
**Partnerships & S Corporations- 3/15/2019**  
**C Corporations – 4/15/2019**

***1) QuickBooks (QB) data file***

Please send us an ACCOUNTANTS Copy of your QB data file. This will allow us to adjust your beginning balances, if necessary, and make tax changes while you continue to work in the data file. When we have completed our work, and your account with us is current, we will send our changes to you and you will simply import those changes into your QB data file. (Please make sure the dividing date is January 1, 2019.) *For detailed instructions, please see our website.*

**Please advise us of the version you are using and password.**

Please note, we are no longer able to support QB2013 or earlier versions.

For MAC users: Please remove all passwords and backup your QB data file for WINDOWS before sending us your information. *For detailed instructions, please see our website.*

***2) Other Documents needed:***

- ✓ December bank Statement(s)
- ✓ December 2018/January 2019 Credit card and line of credit or loan statement(s)
- ✓ W-2's, W-3 recap and the payroll tax returns (941's, etc., if not prepared by us)
- ✓ December Sales tax return, if you were required to file one
- ✓ Any IRS or state correspondence received during the year
- ✓ 1099K's Received
- ✓ # of 1099's issued by your company

***3) In addition, please let us know if any of the following apply to you:***

- ✓ Your company has paid at least 50% of health insurance premiums through the SHOP program for your EMPLOYEES (not owners)--you may also qualify for a TAX CREDIT.
- ✓ You would like to be added to our list for business consulting after tax season. We provide business consulting services to our clients as an additional and very important service. We can analyze your financial data and answer questions such as:
  - Why do I have profit and no cash?
  - How can I make more money?
  - Why can't I just convert my employees to contractors?

***Please visit your SmartVault Portal to upload files ([www.smartvault.com](http://www.smartvault.com) and use your login).***