



2019 BUSINESS TAX CHECKLIST

We are ready to start preparing your 2019 tax returns!

If your accounting records are maintained using QuickBooks Online (QBO):

As soon as you have completed your reconciliations and payroll filings for 2019, please send a note to connie@muellerpyecpa.com to let us know your books and records are ready for us to get started.

If you are using the Desktop version of QuickBooks:

As soon as you have completed your reconciliations and payroll filings for 2019, please send an Accountants Copy of your QuickBooks to QBO@muellerpyecpa.com using Transfer Password **mpaCPA-8**. If you need any assistance uploading the Accountants Copy, please call Connie Murray at 281.665.7973. Be sure to use a Dividing Date of 12/31/19, so that you can continue working in your QuickBooks during 2020. Once we complete your 2019 tax return, we will send you our changes so that you can import them directly into your QuickBooks. That way, your books will match the tax return filed with the IRS.

Additional information to help us make sure you don't miss out on any deductions:

In addition to your QuickBooks information, below is a list of items we will need to prepare your business tax return to make sure you don't miss out on any deductions. You can upload them to us using ShareFile (call or email Connie for the link), regular mail or drop off; whichever is most convenient for you:

- Copy of December statement for all bank accounts, credit card accounts and loans.**
- Invoices for all new equipment or vehicle purchases.**
- Documents from the sale of any equipment or vehicles.**
- Copies of all W-2 and W-3 forms.**
- Copies of your quarterly SUTA tax reports.**
- Copies of all 1099's issued by your company.**
- Inventory balance, if any, at December 31st.**
- Additional information, if applicable:**
 - Business mileage using personal vehicles**
 - Business expenses paid with personal funds and not recorded in Quickbooks**
 - Office-in-home expenses**
 - Square footage of office, and total square footage of home**
 - Operating expenses such as utilities, insurance, repairs and HOA fees**

