



Required Tax Documents for Businesses

First time business filers with SCN, provide the following:

- Last filed 1065, 1120C or 1120S Corp tax return
- EIN number
- Date of incorporation
- Date of S Corp election (*if applicable*)
- Business address
- Names, addresses, social security numbers, and email address.
- Partnership agreement (*if applicable*)

All Filers must provide:

- ❖ Annual income and expense report
- ❖ Annual balance sheet
- ❖ Value of ending inventory as of December 31st (*if applicable*)
- ❖ December bank statement

- ❖ Sum of each partner (*if applicable*)
 - Draws/distributions
 - Contributions

- ❖ List of all assets owned by business (*if applicable*)
 - Date(s) of purchase
 - Cost of item(s)
 - Description