

## **Business Information Checklist**

The below items are required to complete a Business Tax Return Forms 1065 & 1120 (if applicable):

- ❖ Contact name, title, phone & email
- ❖ Copy of last federal & state tax returns filed
- ❖ Form SS-4 Application for Federal ID Number
- ❖ IRS Assignment of EIN (Federal ID Number)
- ❖ List of Partners (full name, address, social security number & email)
- ❖ Articles of Organization
- ❖ State Certificate of Organization
- ❖ Operating Agreement

### **Next Steps:**

We will schedule a meeting for you to meet with one of our partners or staff accountants to review your situation.

We will issue you a work authorization/letter of engagement for your signature prior to commencing work on your return.

If you have any questions, please feel free to contact us for further details.

Borgida & Company, P.C.