



2017 Business Tax Checklist

If Mazuma has been keeping your books all year, then you are in good shape! There are just a few additional items that you may need to provide in order for us to prepare your tax return. Please provide the following information if it applies:

General Information

- A copy of your last filed tax return.
- If this is your first year filing a tax return for the business, we will need the following information for each owner:
 - Full name
 - SSN or EIN
 - Address
 - Phone number
 - Ownership percentages
- Info about ownership changes occurring during the year

Documentation

- December bank and credit card statements
- All 1099s received
- Merchant account annual summaries (Amazon, Paypal, Stripe, etc.)
- Statements for outstanding loans (car loans, business loans, loans from owners, etc) including the balance due at 12/31
- Information on large assets purchased, if not already provided (purchase price, amount financed, date purchased)

Common Business Deductions Not in Bookkeeping

The following items most likely will not show up in your monthly bookkeeping reports, so we would ask you to provide the information at year end if you haven't already:

- Business miles driven
- Business use of home expenses

