BYRD & MASSEY
Certified Public Accountant

New LLC Tax Client – Setup Checklist

- ☐ Legal business name
- ☐ DBA (if applicable)
- ☐ Business start date
- ☐ State(s) of formation and operation
- ☐ Business address (physical and mailing)
- ☐ IRS SS-4 / EIN confirmation letter
- ☐ Articles of incorporation / organization
- ☐ Prior-year federal and state tax returns
- ☐ Current year Profit & Loss statement
- ☐ Current year Balance Sheet
- ☐ Quarterly payroll reports (Forms 941)
- ☐ Annual payroll report (Form W-3)
- ☐ State payroll filings
- ☐ Accounting software used

Client Acknowledgement

- ☐ I understand that incomplete or delayed information may delay tax preparation.
- ☐ I confirm the information provided is accurate to the best of my knowledge.

Client Name: _____

Business Name: _____

Date: _____