



BYRD & MASSEY
Certified Public Accountant

New Partnership Tax Client – Setup Checklist

- ☐ Legal business name & DBA (if applicable)
- ☐ State(s) of formation and operation
- ☐ Business address (physical and mailing)
- ☐ Partner name(s)/DOB(s)/SSN(s)/Mailing address
- ☐ Accounting software used
- ☐ Partnership or operating agreement/Partnership Percentages
- ☐ States where partnership earned income

Required Documents:

- ☐ IRS SS-4 / EIN confirmation letter
- ☐ Articles of incorporation / organization
- ☐ Prior-year federal and state tax returns
- ☐ Current year Profit & Loss statement and Balance Sheet
- ☐ Quarterly payroll reports (Forms 941)/Annual payroll reports (W-3)/State payroll filings

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: _____

Date: _____