BYRD & MASSEY
Certified Public Accountant

New Partnership 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
- [ ] Partnership or operating agreement (if available)
- [ ] Partner ownership percentages
- [ ] Partner admissions or withdrawals during the year
- [ ] States where partnership earned income

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: _____