



RTH WORLDWIDE 

YOUR ACCOUNTANTS USA.COM - TUS CONTADORES USA.COM



2023 BUSINESS TAX ORGANIZER





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- What is your Business Structure: Sole Proprietor (Individual), Partnership, S-Corporation, C-Corporation, or Limited Liability Company (LLC)?
- When was the business formed?
- In what State was the business formed?
- Does the business operate outside of the state of formation?
- If you are a Limited Liability Company (LLC): Have you filed for 8832 Entity Classification Election? If yes, what is your current Tax Classification: Sole Proprietor (Individual) /Partnership/S-Corporation/C-Corporation/Disregarded Entity
- Business Formation Records (Articles of Incorporation, Articles of Organization, Partnership Agreement, Fictitious Name if applicable)
- IRS Tax Identification Number (Federal Employer Identification Number, Social Security Number, or Individual Taxpayer Identification Number)
- Did you make any payments during the year that would require you to file form(s) 1099?
- If yes, did or will you file all required form(s) 1099?
- If you need us to file form (s) 1099 for you, please provide form W-9 Request for Taxpayer Identification Number (<https://www.irs.gov/pub/irs-pdf/fw9.pdf>) and/or spreadsheet with required information and amounts per recipient.
- Prior Years Tax Returns - If you are a first-time tax client, please provide a copy of tax returns for the past 2 years (Federal and State).
- Did you make any estimated tax payments? If so, please provide copies of vouchers and when they were paid.
- Bookkeeping Records - If you use a bookkeeping system, you can provide us with a year-end income (profit and loss) statement and balance sheet. You can also invite us as your QuickBooks external accountant QB@RTHworldwide.com instead.
- 1099-MISC, 1099-NEC, 1099-K Forms- Received or issued, please provide copies of these forms
- Bank and Credit Card Statements – If you have granted us QuickBooks External Accountant Access, please provide all end of year Bank Statements. If we are not your QuickBooks External Accountant, please provide 12 months of statements. If possible, export your Bank and Credit Card statements in a CSV, QFX, QBO, OFX, TXT, or XLS format.
- Do you have any questions/concerns we should be aware of? Feel free to add any additional documents/comments.

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