Crawford, Merritt and Company

Certified Public Accountants

For Business Tax Returns

We strongly recommend uploading your information to us.
Please provide information for each business owned.

For QuickBook files, please upload through our website as the file may be too large for uploading through Smartvault Online Portal.

Below is the information that we need to complete your tax returns.

Items listed below pertain to the tax year we will prepare for you.

- ☐ QuickBooks back up file (portable or accountant's copy) of all accounts. **OR** invitation to QB Online if you have a QuickBooks Online account (instructions on next page)
- ☐ Purchase agreements documents for vehicles or equipment
- ☐ Leased agreements for any leased vehicles for prior year (agreement you received when leased vehicles)
- ☐ Year-end loan statements for vehicles
- ☐ New loan documents for assets purchased
- ☐ December bank statements
- ☐ December credit card statements
- ☐ Form W-3 and W-2 (most recent tax year you had prepared for & provided to your employees) (for new client to us or if not completed by us)
- ☐ Form 1099s (most recent tax year you had prepared for & provided to your subcontractors)
- ☐ Business tax returns for prior year (for new client to us or if not completed by us)
- ☐ Business' name, address and Employer Identification Number (EIN) (for new client to us)

Paper originals provided to us will be returned to you once your tax returns are completed.

Instructions for QBO files to cmccpas.com

To provide us with online access to your QBO account, please follow the steps below.

1. **Open your QBO (QuickBooks Online) account.**
2. **Click on the**  **located on the top right of the QBO page.**
3. **Under the “Your Company” column, click on “manage users”.**
4. **Click on the “Add user” in green on the right side of the screen.**
5. **Choose the “Standard user” and follow the prompts.**
6. **You will be providing Diana Crawford online access with her e-mail of dcrawford@cmccpas.com**