

# 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.**

- 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 during 2019
- December 2019 bank statements
- December 2019 credit card statements
- Form W-3 and W-2 (2019, if you had completed & provided to your employees) (for new client to us or if not completed by us)
- Form 1099s (2019, if you had completed & 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`**