

**⦿ Basic Information**

- Employer Identification Number - EIN
- List of States With State ID Numbers
- Estimated Tax Payments Made - Dates and Amounts
- Last Year's Partnership Tax Return

**● Partner Information**

- Name, Address, SSN/EIN of Each Partner During the Tax Year
- List of Each Partner's Ownership Percentage
- Reports for All Partner Capital Contributions, Withdrawals or Loans
- Reports for All Partner Guaranteed Payments, Compensation, and Benefits Including Cost of Medical and Life Insurance
- Reports of Any Change of Ownership During the Tax Year

**📄 Tax Documents Received**

- All Forms 1099-B, 1099-DIV, 1099-INT, 1099-K and 1099-MISC
- All Other Records for Dividends, Interest or Business Income
- Schedule K-1s Received from Entities Your Partnership Owns
- All Granted Credit Certificates Issued by Federal/State Tax Authorities

**📄 Business and Financial Records**

- Partnership Profit/Loss Report From Company Books
- Copy of Summary of all Form 1099 and W-2 Issued
- Payroll Report of All Payroll Taxes Paid
- Inventory Reports - Beginning Inventory, Purchases, Ending Inventory

**📄 Asset Records**

- Comprehensive Set of All Assets Reports
- Vehicle Information and Mileage Reports or Actual Expenses for Business Use