

BUSINESS YEAR END CHECKLIST

BUSINESS NAME: _____

YEAR END: _____

YES NO

ENGAGEMENT LETTER

Did you sign and return the engagement letter sent to you?

Our professional standards require us to obtain an understanding of our engagement in writing.

DELIVERY

Your business tax returns will be sent to you electronically via SafeSend. You will be able to electronically sign the e-file authorizations.

Please provide the email address for SafeSend delivery of your tax returns:

Do you also need a paper copy of your returns?

1099s

Did your business make any payments that would require it to file Form(s) 1099?

If yes, did or will the business file required Form(s) 1099 (prepared yourself or through Walz Group)?

STATES

Did you begin doing business in any new states?

If yes, please list _____

Did you cease operations in any states?

If yes, please list _____

LOANS AND LEASES

Did you obtain any new business loans or leases during the year?

If so, please provide a copy of the loan or lease document.

OWNERSHIP

Were there any ownership changes during the year?

If so, please provide details.

ADDRESSES

Were there any address changes for the business or owners during the year?

If yes, please provide details.

DIGITAL ASSETS

At any time during the year, did your business (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, or otherwise dispose of a digital asset (or financial interest in a digital asset)?

FOREIGN ACTIVITY

Did the business have any foreign activity or any foreign accounts during the year?

PA ANNUAL REPORT

PA businesses are now required to file an annual report. The filings are due June 30 or Sept 30 depending on the type of entity. Would you like Walz Group to prepare and file this report on your behalf? . . .

