



## STARTUP TAX INFORMATION CHECKLIST

To make filing your startup taxes as smooth as possible, you'll need to know what documents you need. Ideally, you should be assembling this information throughout the year, so you aren't scrambling to produce it at the last minute. You may not need all of this information, or other documentation may be required based on your startup's industry and financial situation.

### Corporate Information

- [Type of entity](#), such as C-Corp, S-Corp, or LLC
- Incorporation certificate
- [Articles of incorporation](#)
- Employee Identification Number (EIN) letter
- Startup's [legal name and address](#)
- List of [state registration numbers](#)
- Name, address, title, and Social Security numbers (SSNs) of company officers
- Detailed [capitalization table](#) listing name of each shareholder, percentage of shares held, and type of shares (preferred or common)
- Information about any [foreign subsidiary](#)
- Information about any change in structure, such as a [merger/acquisition](#)
- Name and title of company officer who will sign the return's electronic federal tax payment system (EFTPS) and any state online login credentials

### Financial Documents

- [Method of accounting](#), either cash or accrual
- [Financial statements](#), such as [income statement](#), [balance sheet](#), [cash flow statement](#), and general ledger
- [Payroll data](#), including W-2s, tax returns, and per-state allocations for remote employees
- Revenue data, including [per-state allocations](#) for states where you have revenue
- Property data, including [per-state allocation of any fixed assets](#)
- Estimated tax and tax paid for prior year
- Amount of any refund(s) applied to prior year taxes
- Information about any [tax credit](#) received, including [R&D tax credit](#)
- [Cryptocurrency](#) transactions
- All [1099s](#) issued by the entity
- Any sale of business assets or company stock



- Accrued expenses
- For startups incorporated during the tax year, any start-up and organizational expenses

## Prior Year Returns

- All prior year's returns, both federal and state
- Any [depreciation](#) claimed in earlier years
- [Net Operating Losses](#) (NOL) from earlier years
- Any [correspondence](#) to or from the IRS or state tax authority, including any adjustments made to prior returns that could affect later returns
- Prior year overpayments
- Estimated tax payments
- Extension payments