

BUSINESS CHECKLIST
Main Street Tax and Accounting Services, Inc

Related to the preparation of your business income tax return, please read, sign, and date the attached engagement letter and return it to our office by fax, email or mail. If you have any questions call our office before you sign and date the letter.

If applicable please bring or drop off the following:

- ☐ **SBA Loans received in 2023 – Need loan agreements & date you received monies**
- ☐ **Your business records are due in our office by 1/15/2024. If you find you cannot meet this due date, please call our office before January 15.**
- ☐ **Log your odometer(s) 12/31/23**
- ☐ **Value your business inventory 12/31/23 using the actual cost you paid**
- ☐ **1099 worksheet, if applicable, is due in Main Street's office by 1/08/24.**
- ☐ **Update your annual business minutes – On our website you will find “Shareholder/LLC Member Letter”, which will help you complete this task.**
- ☐ **Did you sell anything, whether personal or from items you bought at a yard sale (this means anything), to anyone? Did you use the same platform, throughout the year, to sell the items and receive more than \$599.00 throughout the year? Did you use multiple platforms to sell these items and sold more than \$599.00 throughout the year from any platforms? If yes to the last two questions, we will need to see each 1099K you received from each platform. You will need to include the date you sold each item, a description of what was sold, how much you received from the sale, selling expenses, what you paid for each item you sold and the date you purchased each item you sold. If you sold multiple items, I would need this detail on each item sold.**

If you have any questions on the above or the attached, please feel free to contact our office at your convenience.