

Swiftcurrent Consulting & Accounting, PC
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In effort to better help our clients organize documents that we will need to prepare the return, we are including a checklist for your business. Please use the checklist and attach any documents that are requested for your return. These are questions we often find ourselves asking clients and if the documentation is provided upfront, it will help us to more efficiently prepare your return.

	Yes	No
• Have all business bank accounts been reconciled through December 31, 2017?	<input type="checkbox"/>	<input type="checkbox"/>
• Please include December 31, 2017 statements confirming loan and credit card balances of business debts	<input type="checkbox"/>	<input type="checkbox"/>
• Have 1099s been prepared if required?	<input type="checkbox"/>	<input type="checkbox"/>
• Did the business have any foreign bank or financial accounts?	<input type="checkbox"/>	<input type="checkbox"/>
• Did the addresses of any partners/shareholders change in 2017?	<input type="checkbox"/>	<input type="checkbox"/>
• Did the business's address change from last year?	<input type="checkbox"/>	<input type="checkbox"/>
• Did the business have any debts cancelled in 2017?	<input type="checkbox"/>	<input type="checkbox"/>
• Where there any changes to the partners/shareholders of the business?	<input type="checkbox"/>	<input type="checkbox"/>
• Where there any changes to the bylaws or partnership agreement?	<input type="checkbox"/>	<input type="checkbox"/>
• Have minutes been updated?	<input type="checkbox"/>	<input type="checkbox"/>
• Were there any major asset purchases or dispositions?	<input type="checkbox"/>	<input type="checkbox"/>
• Please include 4 th quarter payroll reports	<input type="checkbox"/>	<input type="checkbox"/>

Reminders

- We have moved offices. Come visit us on 19 Appleway Drive in Kalispell
- Make sure you have up to date mileage logs
- Remember to retain all tax documents even after we complete your return