



Business Consultation Checklist

Welcome! We're excited to meet you. To help us make the most of your consultation, please bring any information or documents you have. No need to worry if you don't have everything—just bring what you can, and we'll take it from there!

Below is a general list of what to bring or have ready to provide:

Business Information

- Completed business information form (see page 3)
- Articles of Organization from Secretary of State that contains the following information
 - Legal business name and DBA (if any)
 - Start date of your business
- Business address and phone number
- Employer Identification Number (EIN) or SSN (for sole proprietors)
- Operating Agreement that contains the following information:
 - Business structure (LLC, S Corp, C Corp, Partnership, Sole Proprietor)
 - Owner/Member listing with ownership percentages
 - Manager listing
 - Financial/Capital contributions to the company (including assets contributed)
- Business license(s) or permits

Tax Documents

- Most recent business and/or personal tax return (if available)
- Any IRS or state income tax notices
- State tax letters for sales tax, use tax, corporate income tax etc.



Financial Information

- Year-to-date income statement (income & expenses/profit/loss statement)
- Balance Sheet (if available)
- Recent bank statements
- Details of business loans or financing
- Receipts for large purchases (equipment, vehicles, property, etc.)

Payroll & Contractors (if applicable)

- Payroll reports or access to your payroll system
- W-2s or 1099s issued
- List of employees or contractors

Other Helpful Information

- Business plan or brief summary of your operations
- Accounting/bookkeeping reports (QuickBooks, Wave, etc.)
- Questions or topics you'd like to discuss

Pro Tips

- Digital copies are great — email them ahead of time or upload them to our secure portal
- Organize documents by section for a smoother consultation.
- Note any major changes since starting your business (new equipment, employees, locations, etc.).



Business Information

Legal name of business entity:
DBA name of business entity (if different):
Business EIN:
Missouri Tax ID:
Entity legal structure (circle one): Sole Proprietor Partnership S-Corp C-Corp Non-Profit
Business Address:
Business Phone:
Business Email:

Owner Information

Owner Name & Title:	Percentage Ownership:
Owner Address:	
SSN:	DOB:
Owner Phone:	
Owner Email:	
Amount of time spent working for business (percentage of all jobs):	

Owner Name & Title:	Percentage Ownership:
Owner Address:	
SSN:	DOB:
Owner Phone:	
Owner Email:	
Amount of time spent working for business (percentage of all jobs):	

Do you currently process payroll? Y/N
If yes, who is your payroll provider? _____

Do you keep up-to-date accounting records? Y/N
If yes, who is your accounting provider/ software? _____

What services are you interested in My CPA Guy providing to your business?

- Tax Preparation
- Tax Planning
- Payroll
- Accounting