

Sunrise Finance & Consulting

Small Business Guide Library

What to Send Your Accountant Before Tax Season

Make your CPA smile with a neat package:

- Year-end P&L, balance sheet, and general ledger.
- Bank and credit card statements.
- Asset purchase invoices.
- Prior year return (if new client).
- 1099s, W 2s, K 1s.
- Mileage logs and home office details.
- Notes on major changes (loans, owners, address).

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