KRISHNAN COMPANY
CERTIFIED PUBLIC ACCOUNTANT

Information Required from Client
(Account Transferred from Previous Accountant)

1. Sales Tax Returns for tax year and year to date (If applicable)
2. Payroll Tax Returns for tax year and year to date . (Including 941, DOL and Dept of Revenue returns)
3. Personal Property Tax Returns for all the previous years and year to date.
4. Corporate Tax Returns & Profit Loss statement for the previous years.
5. Any year to date profit loss statement.
6. Year to date payroll tax summary details showing Gross, Medicare, Social Security, Federal Tax withheld, State Tax withheld and Net Pay. Also Employees details such as Name, Social Security number and address.
7. Also need the following information
    a. Federal ID #
    b. Sales Tax ID #
    c. DOL Account #
    d. State ID #

8. Also provide us the copy of the following:
    a. Certificate Of Incorporation
    b. Articles Of Incorporation
    c. Federal ID # confirmation
    d. Form 2553 “S” Corp Election and acknowledgement received from the IRS (If applicable)
    e. Personal tax returns for the previous years
    f. Any closing documents.

9. If client use accounting software such as Quick Books, Peachtree Accounting then we need the back up copy of that and if not then we need all Bank Statements along with the cancelled checks and Check Stubs.

CPA SM

America Counts on CPAs

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