

2023 Partnership Tax Checklist

- Provide us with your Partnership information
 - Name of Partnership:
 - Partnership Address:
 - Occupation/Business Activity:
 - States your Partnership worked in:
 - States your Partnership is registered in:
- Ownership of Partnership
 - Provide a list of the name, address, and ownership percentage of each partner
- Provide a list of the amounts you paid each partner
 - Distributions (payments to partners)
 - Guaranteed Payments (payments to partners for services the partner provides)
- Sign and send us your Engagement Letter.
- Sign Notice Protection Letter
- Prepare and send us your Income and Expenses. Choose one of these options:
 - Quickbooks Online/Quickbooks Self Employed/Quicken
 - Make sure all transactions have been added from 1/1/2023 to 12/31/2023.
 - Make sure you have reconciled your bank accounts and credit card accounts.
 - Add us as your accountant by using info@emtaxservice.com
 - Send us an Excel Spreadsheet (if using numbers, please convert to excel)
 - This can be our spreadsheet, one that you have created or an emailed list. It must include:
 - Totals of income and expenses
 - Business bank account balances at 12/31/2023
 - Business credit card ending balances at 12/31/2023
 - List of Assets the company owns (auto's, computers, etc) and date purchased
 - List of Liabilities (car loans, equipment loans, etc.) and loan amounts as of 12/31/2023
- Standard questions:
 - Are there any changes of ownership in 2023? This could be a new investor, change of ownership between partners. Provide new agreement and date of these changes.
 - Was this company used to produce a film? If so, what date was it completed and placed into service/available to be purchased? _____
 - NOTES: