

Preparation for initial meeting

Your business's mission/vision statement
Copy of Last 2 Years Tax Returns – Business and Personal
Year-to-Date Tax Payment and/or Paystubs
IRS/State Tax Notices (If any)

Corporation Record Books
Copy of QuickBooks File, if applicable
Year-to-Date Profit & Loss and Balance Sheet
Business Cash Flow Projection or Budget (If Any)
Current Bank Statement – Business/Personal
Personal Financial Statement



