

FREE INFORMATION · PREPARATION GUIDE

Small Business Tax & Financial Records Readiness Checklist

A calm, privacy-conscious guide for organizing questions and records before an accounting conversation.



Prepared for **The Firm of Robinson Craig & Rogers**

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1 Begin with a calm plan

Start with what you know. You do not need perfect books or every document before asking which records and services may be relevant.

A helpful reminder. Organization can begin with one folder and one clear question. The purpose is to feel prepared—not to solve every accounting issue on your own.



Gather	Protect	Discuss
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1.1 Prepare at your own pace

- ☐ Write one sentence about the result you want from the conversation.
- ☐ List the business name, activity, locations, owners, and employees without adding secure identifiers.
- ☐ Note which bookkeeping, payroll, tax, financial-statement, IRS, nonprofit, loan, or grant records already exist.
- ☐ Keep Social Security numbers, taxpayer IDs, banking details, passwords, and confidential records out of ordinary forms and email.
- ☐ Ask the firm how sensitive documents should be transmitted if a professional engagement begins.

Preparation notes

2 Free information you can use

The short subjects below support both careful reading and quick scanning. Mark the topics that matter now, then return to the others when they become useful.

Starting with organized books

Identify the records and routines that make monthly bookkeeping and year-end preparation easier.

Reading basic financial statements

Know what a balance sheet and income statement are designed to show and which questions to bring.

Payroll reporting readiness

Collect payroll summaries, reporting records, and questions without sending confidential data through an initial form.

Preparing for business tax filing

Locate general record categories before a tax-preparation conversation without choosing a tax position.

When an IRS notice arrives

Preserve the notice, dates, and prior filings, then seek fact-specific professional guidance.

Nonprofit financial readiness

Organize questions about formation, books, payroll, taxes, grants, and reporting.

2.1 Published services or program areas to confirm

Use this list as a conversation guide. Availability, eligibility, scope, pricing, and location details can change.

- Bookkeeping and monthly accounting
- Business, individual, and trust tax preparation
- Payroll tax reporting and financial reviews
- IRS representation
- Business startup and credit support
- For-profit and nonprofit accounting support

Topics I want to discuss

3 Questions to bring with you

- ☐ Which records should I prepare, and how should I transmit them securely?
- ☐ Which published service appears most relevant to the issue I described?
- ☐ What additional information is needed before the firm can assess the work?
- ☐ Who will handle communication and document requests?
- ☐ What scope, timing, and fees should I expect if I engage the firm?
- ☐ How can bookkeeping, payroll reporting, tax preparation, and financial review work together?

My priority question:

Conversation notes:

3.1 Contact and verify current information

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Operational details were reviewed in September 2026. Confirm current information before relying on it.

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