
the library

bookkeeping & tax preparation

BOOKKEEPING – GETTING STARTED

Here is a list of items that we will need to have available when we start on your bookkeeping:

- Current Quickbooks or Quicken file – if you want to take over for yourself or another bookkeeper.
- Copies of statements for all bank accounts or credit cards in use by your business. (This may not be necessary if we have access to your accounts online)
- Authorization Form – This has all the information we need to access your accounts online, which is our preferred method of accessing your accounts.
- Bookkeeping Engagement Letter
- Previous Year's Tax return – if possible it would be great to have a copy of your previous year's tax return so we can make sure we are tracking everything in the most efficient way.

And that's it! We look forward to working with you!