



## BUSINESS CHECK-UP

### DOCUMENTS NEEDED FOR SERVICE PROPOSAL:

- Copy of **recent bank statements** (last 2-3 months)
- Any **credit card statements** used for business expenses
- Copy of most recent **balance sheet**
- Copy of most recent **profit & loss statement** (YTD through last completed month)
- Copy of most recent **tax return**
- Quickbooks file (if applicable)
  - a.) If you have the desktop version, please send via our [secure link](#).
  - b.) If you have the online version, please send an to [this address](#).