



Prestige Tax Group, Inc.

Business Records Before Your Tax Appointment

Individuals and business owners preparing records for their tax preparer or bookkeeper.

Organization only. This pack does not calculate tax, decide deductibility, establish filing requirements or replace individualized advice from a qualified professional.

Four checks before you proceed

Create a records map

Identify the period and the person or entity the records belong to. List each financial account and the months available without recording passwords or full account numbers. Separate personal and business records for review, while leaving classification questions open for the preparer. Mark missing statements and unclear ownership early. This avoids a pile of documents being mistaken for a complete file.

Match source records to questions

Group deposits, receipts, invoices and payment records by period. Preserve the original evidence and add a note for transactions that need clarification. A worksheet entry is an index to evidence, not proof of a tax treatment. Do not decide whether a cost is deductible based on the category label. Give your preparer enough context to ask the right question.

Prepare the professional handoff

Ask the professional which documents they need and which secure upload process to use. Record what was supplied, the date and any missing items. Send sensitive identifiers only through the designated secure channel. Keep payroll, contractor, prior return and entity questions in the follow-up register when applicable. Avoid emailing a broad folder without confirming access and scope.

Maintain a monthly review habit

At the end of each review period, reconcile the document index to the available statements and evidence. Identify missing invoices, unclear deposits and unresolved questions. Record who will resolve each item and when. Let the bookkeeper or preparer determine accounting treatment. Carry open questions forward explicitly instead of silently marking the month complete.

Your next step

Open question	Who should answer	Next date

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