



Onboarding Checklist | NEW BUSINESSES

Here's a list of the documents required to begin your journey as a new business client. Once you've obtained the required materials, you can upload them to our secure online portal to ensure a safe and convenient submission.

BUSINESS DETAILS AND TAX RELATED DOCUMENTATION

- EIN Verification and IRA Entity Acceptance Letters (147C and/or SS-4 and/or CP261 if applicable)
 - Copies of last three years of corporate tax returns
 - Copies of last three years of individual tax returns
 - Deprecation Schedule
 - Applicable business credits
 - Net Operating Loss Carry Forward (if applicable)
 - Articles of Incorporation
 - Operating Agreement (Partnership)
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BUSINESS RENTAL PROPERTIES

We also provide assistance with business-related rental properties. Please indicate any services you are interested in and include a copy of your previous filings with your documentation.

- Personal Property Tax Declaration
 - Income and Expense Reporting - Rentals
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BUSINESS ADVISORY SERVICES

Our business advisory services provide strategic insight, financial analysis, and decision support for businesses facing complexity, transition or growth. Please indicate any areas of interest:

- Litigation Support + Forensic Analysis
- Business Plan Development
- Business Valuation Support
- Operational + Financial Consulting
- Business Financing + Capital Advisory
- Budgeting + Forecasting