

Tax Prep Checklist (Partnership)

Created with care by
Paige Financial Services



Partner Information

- Name, address, and SSN/EIN of each partner during the year
- Each partner's ownership % including their profit and loss % if different
- Information regarding capital contributions, distributions or other financial transactions involving a partner
- Information regarding:
 - each partner's share of liabilities
 - Guaranteed payments made to any partner
 - any insurance plan provided to any partner
 - any liquidating payments made to any partner
 - any change in ownership percentages including the addition or loss of partners



Documents to Collect



- Copy of the partnership agreement with any amendments and bylaws
 - (If an LLC taxed as a partnership: copies of the LLC operating agreement and articles of organization)
- List of federal and state employer identification numbers (EINs)
- Last year's Form 1065 and Schedule K-1 and any state or local returns



Do you feel confused or need an extra set of eyes? We're here to help! Contact us at 877-229-3829 for support.