

# BEGINNING OUR JOURNEY

## Discovery

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Starting a new partnership is exciting, and we want you to feel confident every step of the way. That's why our journey begins with a Discovery phase. This gives us a chance to get acquainted and make sure we're a good fit.

Next, we request a few key documents to verify information and confirm business details. This helps us build a clear foundation so we can address your specific needs and deliver financial organization and compliance management services with accuracy and efficiency.

## Document Checklist

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### **Business Formation Document**

*Certificate of Formation or Articles of Organization provided to you by your state of registration*

### **State Tax ID Letter**

*Notice showing your franchise tax or privilege tax filing number*

### **IRS EIN Letter**

*Letter showing your Employment Identification Number (EIN)*

### **S-Corp Election Approval**

*Confirmation from the IRS of S-Corp tax status*

### **DBA or Trade Names**

*Registrations for "doing business as" or assumed name certificates*

### **Operating Agreement**

*Document outlining ownership, roles, and decision-making*

### **Recent Tax Returns**

*Last two years of filed returns, both business and personal, if applicable*