LOCKHART & POWELL, CPAs
4595 Hilton Parkway, Suite 100
Colorado Springs, Colorado 80907

We are ready to prepare your 2025 tax return!

If your accounting records are maintained using QuickBooks Online (QBO):

As soon as your books are complete and you have uploaded any additional required documents to your TaxDome portal, please **contact our team** via chat, email, or call 719-578-8200 to notify us that your business is ready for preparation.

If your accounting records are maintained using the Desktop version of QuickBooks:

As soon as your books are complete, please upload a backup copy to your TaxDome portal, along with any additional required documents. If your file is too large to upload, please mail or drop off a USB. Please **contact our team** via chat, email, or call 719-578-8200 to notify us that your business is ready for preparation.

If your accounting records are NOT maintained through QuickBooks:

If your records are not maintained through QuickBooks, the next best option is a Microsoft Excel spreadsheet that clearly identifies each income and expense category. For example, Service Revenue, Rent Expense, Utility Expense, etc. Clients can download a free Excel business template at Lockhartandpowell.com/Resources. Please upload your spreadsheet and additional required documents to your TaxDome portal and **contact our team** via chat, email, or call 719-578-8200 to notify us that your business is ready for preparation.

Additional required documents:

In addition to your QuickBooks or Excel spreadsheet, please upload the following documents to your portal. If you need access to your portal, visit Lockhartandpowell.com/Client-portal

- ☐ **Please DO NOT provide all business receipts—only purchases exceeding $2,500**
- ☐ **Receipts for all new equipment or vehicle purchases**
- ☐ **Documents from sale of any equipment or vehicles**
- ☐ **Copy of Officer W-2s and form W-3 for S-Corporations (unless ADP client)**
- ☐ **Officer health insurance premiums (if not included in QuickBooks or W-2)**
- ☐ **Year-end cash balance for all business bank accounts**
- ☐ **Year-end loan statements for all business loans**
- ☐ **Any 1099s that were issued from the company**
- ☐ **Additional information, if applicable:**
  - ☐ **Business mileage, business expenses paid with personal funds and not recorded in QuickBooks/Excel, home office expense (please provide sq. ft. of office)**

NOTE: Visit Lockhartandpowell.com/Resources for additional templates and downloads.