



SALES TAX FILING CHECKLIST

Please bring the following documents.

Business & Tax Information

- Legal business name/DBA
- Structure
- Federal EIN / State Tax ID
- States collecting sales tax
- Sales tax permits/licenses

Sales Records

- Detailed sales ledger
- POS reports
- Online platform statements
- Exempt sales documentation
- Refunds/returns documentation

Purchase Records

- Taxable purchases
- Exempt purchase invoices/receipts
- Credits or deductions documentation

Prior Filings & Payment Records

- Previous sales tax returns
- Proof of payments
- Notices from agencies

Filing Period Details

- Reporting frequency
- Start/end dates
- Late or amended returns needing reconciliation

Additional Notes

- Multi-state obligations
- Online sales/marketplace rules
- Pending documentation



Unusual/large transactions requiring review