

# **B'S PROFESSIONAL ASSOCIATES**

## **Free Business Toolkit**

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### **1. IRS Audit Checklist**

- Organize tax year documentation
- Include W2s, 1099s, receipts, mileage logs, etc.
- Prepare business bank statements & proof of expenses
- Ensure profit & loss statement is current and categorized

### **2. Tax Organizer Template**

- Personal info summary (SSNs, dependents)
- Income documents checklist (W2s, 1099s, etc.)
- Business income & expenses log (Schedule C)
- Deduction tracker (medical, charity, education, etc.)

### **3. Grant Readiness Guide**

- Verify legal business structure (LLC, Corp, etc.)
- Ensure EIN and DUNS numbers are active
- Create/update business plan & financial projections - Register with SAM.gov and Grants.gov

## 4. Business Credit Starter Kit

- Apply for your DUNS number (dnb.com)
- Open a business checking account
- Set up Net 30 accounts (e.g., Uline, Quill)
- Establish business phone, address, and email
- Monitor credit with NAV or CreditSafe



Note: For personalized help, visit [www.bspa1.com](http://www.bspa1.com) or call 833-224-6263

