



# Small business tax readiness checklist

An easy, DIY checklist to make sure you're ready for tax season.

## 1. Your books are up to date

- ☐ Accounts are reconciled through the end of your fiscal year
- ☐ All transactions are categorized
- ☐ Business and personal spending are separated
- ☐ Reimbursements have been processed

## 2. You've collected the info you need for payroll tax filings

- ☐ Contractor info (W-9s) have been collected, and you have filed 1099-NECs for your contractors
- ☐ Payroll records are accurate, and you have filed your annual and quarterly payroll tax returns

## 3. You understand your sales tax obligations

- ☐ You know where you have sales tax nexus
- ☐ You're collecting, remitting, and filing where required

## 4. You're prepared for year-end + income tax filings

- ☐ Estimated taxes paid (or planned) if profitable
- ☐ No outstanding IRS/state notices
- ☐ You have a tax preparer — or a plan to get help

**Taxes already have you worried?**

**Pilot can help.**



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