

🎉 Welcome!

We can't wait to have you on board! Our team is ready to help you migrate your US tax, compliance & accounting to Inkle.

1 Entity & legal documents

These are the foundational documents that tell us who your company is and how it was formed.

-  Certificate of Incorporation
-  Employer Identification Number (EIN) issuance letter from the IRS
-  Latest updated Cap table
-  Foreign qualification documents in other US states (if applicable)
-  Board documents: legal documents, board resolutions etc. (optional, but helps us plan better)
-  Share purchase/ intercompany agreements

2 Historical filings & financials

This helps us understand where your books and compliance stand before we take over.

-  Previously prepared financials in any format
-  All past tax filings and acknowledgement receipts.
-  Expense report in an Excel sheet with supporting invoices
-  Notify your prior CPA and/or bookkeeper that Inkle will be taking over all filings going forward — please ask them not to initiate any new filings in the interim

3 Connect banks & software access

This is where we plug into your existing financial infrastructure so nothing is missed.

Bank accounts

- Connect your bank to Inkle Books via Plaid and Direct connections to allow your transaction feed to flow in automatically
- Add support@inkle.ai as a bookkeeper in your bank account's team settings

stripe

- Add support@inkle.ai as a member in your Stripe dashboard under business settings

 **intuit quickbooks.**  **Zoho Books** (if applicable)

- Give accountant access to support@inkle.ai to your previous bookkeeping softwares or an export of prior data for a seamless migration to Inkle Books.

4 Foreign entities (if applicable)

If you have subsidiaries or foreign entities alongside your US entity, share these:

-  Full list of entities and directors
-  Date and proof of subsidiarisation
-  Subsidiary cap table

What happens next

Once we receive everything above, your Inkle Account Manager will review your documents and kick off your account setup within 24 hours. You'll get a confirmation once your books, filings, and compliance dashboard are ready to go.

Any questions along the way? Reach us on Inkle Chat — we're always here.