Partnership Tax Return Checklist

To ensure your partnership return is filed accurately and on time, please gather and upload the following documents. This checklist is required for filing Form 1065 and issuing K-1s to each partner.

- Prior year's Form 1065 and K-1s (if applicable)
- Articles of Organization or Partnership Agreement
- EIN confirmation letter from the IRS
- Year-end Profit & Loss statement
- Year-end Balance Sheet
- Partner details (name, SSN, ownership %, address)
- Documentation of capital contributions and any distributions
- Payroll reports (if the partnership has employees)
- Depreciation schedules for business assets
- IRS or state correspondence (notices, CP letters, etc.)

Need help? Contact WealthCrest Financial

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