Unity FINANCIAL GROUP

Bookkeeping & Financial Organization

Get organized. Move forward.

Let's get your records together.

Type in the shaded boxes, tick what you have, then save a copy. No sorting required.

Your name

Years / months (or "Not sure")

01 Start with what you have

- ☐ Sales invoices, income summaries and payment processor reports
- ☐ Bank, credit card and loan statements for the period involved
- ☐ Receipts, bills and proof of business payments
- ☐ Prior bookkeeping reports, filed returns or tax notices, if applicable

02 Tell us about your business

Business name

Business type / activity

Did the business operate during this period?	Select...
Were personal accounts used for business payments?	Select...
Did you pay employees or contractors?	Select...
Did you buy or sell inventory / products?	Select...
Did you buy equipment or use business loans?	Select...
Are any records missing or unavailable?	Select...

- ☐ I have registration, EIN, payroll, inventory or equipment records, if applicable.
  Unity will request any additional records specific to your industry and service.

03 How would you like to begin?

- ☐ Bring paper records to an agreed appointment.
- ☐ Request secure upload instructions for digital files.
- ☐ Get help with the first batch.

What is missing, or what would you like help with?

Keep originals. Never send passwords. Your preparer decides filing requirements and tax treatment.
This form does not submit automatically. Return your saved copy using an agreed secure method.

unityfinancialgrp.com | info@unityfinancialgrp.com