



# MURINE FINANCIAL STUDIO

Accurate Books · Organized Systems · Reliable Reporting

## **Year-End Close Checklist (Small Business Edition)**

A structured guide to help you prepare for year-end, tax filings, and clean annual reporting.

- Complete all month-end steps
- Reconcile all accounts through 12/31
- Verify W-9s for all contractors
- Prepare 1099 vendor list
- Review payroll reports & W-2s
- Confirm fixed asset additions/disposals
- Update depreciation
- Review loan balances & interest totals
- Verify sales tax filings for the year
- Review owner contributions/distributions
- Clean up chart of accounts
- Review P&L by month
- Review Balance Sheet for accuracy
- Prepare year-end financial package
- Send documents to tax preparer

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