BUSINESS RETURN HANDOFFS / 01

GIVE EACH OUTPUT ITS OWN RECORD

Use Entity A / Period 1 labels. The preparer defines the output after private review, not this worksheet.

A helpful preparation resource from PickYourPro.ai. Fill in digitally or print. Keep your completed copy private.

Entity A / Period 1: preparer-defined Output A1 / written engagement reference

A1 prerequisite: upstream record or output label / supplying professional role / unresolved gap

A1 review contact role / intended recipient role / separate engagement that depends on it

Entity B / Period 1: preparer-defined Output B1 / written engagement reference

B1 prerequisite: upstream record or output label / supplying professional role / unresolved gap

B1 review contact role / intended recipient role / separate engagement that depends on it

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BUSINESS RETURN HANDOFFS / 02

FOLLOW THE OUTPUT THROUGH HANDOFF

Reuse A1 and B1. A planned delivery is not a completed filing; ask the preparer what each status means.

A1: provider-confirmed scope / prerequisite received or still pending / question owner

A1: client review step / intended recipient role / agreed private exchange process

A1: delivered-version reference / recipient confirmation / later correction contact

B1: provider-confirmed scope / prerequisite received or still pending / question owner

B1: client review step / intended recipient role / agreed private exchange process

B1: delivered-version reference / recipient confirmation / later correction contact

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BUSINESS RETURN HANDOFFS / 03

CHECK THE GAPS BETWEEN ENGAGEMENTS

Tick what is clear. Keep dependency questions open until the responsible professionals confirm them.

- [ ] Each entity-period engagement has its own label
- [ ] Every proposed output has a written scope reference
- [ ] Upstream bookkeeping work is identified separately
- [ ] Missing prerequisites have an assigned contact role
- [ ] Any owner-return work is separately scoped
- [ ] Review contacts and recipient roles are distinct
- [ ] Delivery references are separate from planned dates
- [ ] Private documents and sensitive identifiers stay out

Output still blocked / missing prerequisite / supplying role / next coordination question

Business-return versus separate owner-return scope gap / professional to clarify it

Changed output / original reference / recipient who needs a version update / follow-up owner

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BUSINESS RETURN HANDOFFS / 04

QUESTIONS FOR THE BUSINESS PREPARER

Use the same entity-period labels and dependency questions in each private consultation.

Outputs: what exactly is included for Entity A / Period 1 and Entity B / Period 1?

Prerequisites: what do you need from the bookkeeper or another preparer for each output?

Coordination: who resolves a missing item when two engagements depend on one another?

Boundaries: what owner-return or other work needs a separate agreement?

Review and delivery: who checks, receives and confirms each output through the private process?

Changes: how are updated versions and recipient follow-up coordinated?

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BUSINESS RETURN HANDOFFS / 05

COMPARE COVERAGE AND HANDOFF OWNERS

Use Preparer A and B in each box. Compare the same requested outputs, not different service bundles.

Preparer A / Preparer B / discussion dates / same entity-period and output labels

Outputs included, written exclusions and separately scoped owner-return work - A / B

Upstream dependencies, coordinating roles and unresolved prerequisites - A / B

Review, private recipient handoff, delivery confirmation and correction contact - A / B

READY TO HEAR FROM PROS?

Create an account on PickYourPro.ai only if you choose, then start a Tax Preparation request. Describe a non-sensitive business-return scope and the handoffs you need coordinated so participating pros can compete with proposals. Compare output coverage, professional roles, secure exchange, review and follow-up. Keep returns and private business details out of the request.

One request. Every pro's best offer.

Start a request

Participation varies. A private engagement and dependency review may be needed before a final proposal.

Planning guide: https://www.pickyourpro.ai/services/tax-preparation/business-returns

IRS: Selecting a tax professional as a small business taxpayer (official reference)

IRS: Business structures (official reference)

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