

🎉 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.

Here's what we will need:

Incorporation

- Certificate of Incorporation
- Employer Identification Number (EIN) issuance letter from IRS
- Captable
- Foreign qualification documents in other US states

Filings & Financials

- Previously prepared financials (any format)
- All past filings
- Ask prior CPA to not do any more filings
- Expense report in an excel sheet with supporting invoices
- Connect banks to Inkle Books
Allow transaction feed from your banks to flow into Inkle Books via Plaid

Third Party Software Access

- Provide bookkeeper access for Bank accounts
Add admin@inkle.io as a bookkeeper in your bank accounts team settings
- Provide accountant access for Stripe
Add admin@inkle.io as a member in your Stripe dashboard business settings
- Provide access for Quickbooks/Zoho Books
Add admin@inkle.io as bookkeeper for Quickbooks & team_alpha@inkle.io as admin for Zoho Books in team permissions, and remove your old CPA/bookkeeper

Board documents (optional)

- Legal documents, board resolutions etc. Optional, but helps us plan better.

Overseas Entities

- Entities list and directors
- Proof of subsidiarization
- Subsidiary captable