

Domestic Business Entity—Tax Organizer

Business name:	EIN:
Tax matters person:	Phone:

Type of Entity
 C corporation S corporation General partnership Limited partnership LLC Other:
 State in which business was formed: _____ State ID#: _____

Corporations
 State corporate charter number: _____ For S corporations, date of S election (Form 2553): / /

Partnerships/LLCs
 Is there a written partnership agreement? Yes No Did the partnership elect corporate taxation? Yes No

All Entities
 Description of business activity and principal product or service:

Date business entity formed: / / Date business operations began: / /

Number of shareholders/partners/members: Number of employees: Projected yearly gross receipts: \$

Is the business entity currently in good standing with federal and state taxing authorities? Yes No

Shareholders/partners/members:

<i>Name</i>	<i>SS/ID number</i>	<i>Phone</i>
<i>Address</i>		<i>Ownership percentage</i>
<i>Name</i>	<i>SS/ID number</i>	<i>Phone</i>
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<i>Address</i>		<i>Ownership percentage</i>

Attach additional sheets if necessary.

Information Needed

Please provide the following items in order to prepare the tax return for the business entity:

- Balance sheet
- Income statement
- Ending cash balance (from reconciled bank account statements)
- Details of withdrawals by owners—wages, guaranteed payments, loans, expense reimbursements, etc.
- Details of loans from owners to the business, including any loan repayments
- Details of contributions to capital made by owners during the year
- Details of any ownership changes during the year
- Statement of capital accounts of all owners
- Payroll summary
- Copies of all statements of payments made to employees or contractors (Forms W-2 or 1099)
- Pension plan summary showing all contributions to employees' retirement plans
- Copies of prior year tax returns—include depreciation schedules
- Dates, amounts, and check numbers for any estimated tax payments to federal or state
- Names, contact information, and relationship of other consultants involved with the business
- For S corporations, a copy of Form 2553, *Election by a Small Business Corporation*
- Copy of Form 8832, *Entity Classification Election*, for a non-corporate entity that elected corporate taxation
- For a C corporation, details of any dividends distributed and copies of all Forms 1099-DIV

Please note any applicable items above that will not be submitted. Financial statements and additional filings can be prepared by our office for an additional fee.

Partnerships/LLCs

1) Indicate the type of entity: Domestic general partnership Domestic limited partnership Domestic LLC
 Domestic limited liability partnership Foreign partnership Other: _____

2) Are any partners in the partnership also partnerships? Yes No

3) Did this partnership have any ownership interest in another business entity? If yes, provide details. Yes No

4) Did the partnership file an election for partnership level tax treatment? If yes, provide a copy of the election.

5) Does the partnership have any foreign partners?

6) Is this a publicly traded partnership?

7) Is this partnership required to file a return providing information on reportable transactions (IRC §6111)?

8) During the tax year, did the partnership have any transactions involving a foreign trust?

9) Was there a distribution of property or a transfer of a partnership interest during the year?

C Corporations/S Corporations

1) What accounting method was used by the corporation? Cash Accrual Other: _____

2) Did this corporation have any ownership in another business entity? If yes, provide details. Yes No

3) Is this corporation required to file a return under IRC Section 6111 to provide information on reportable transactions? Yes No

4) During the year, did any individual or entity own more than 50% of the voting stock? Yes No
If yes, provide details.

5) Did the corporation issue debt instruments with original issue discount?

6) Amount of any tax-exempt interest received or accrued during the year. \$ _____

7) For C corporations, did the corporation pay dividends in excess of earnings and profits during the year? Yes No

8) For S corporations, did the corporation ever operate as a C corporation before electing S corporation status? Yes No

9) Were there any foreign shareholders during the year?

10) Did the corporation own any foreign assets during the year?