

## General Information

<b>Business legal name</b>				<b>EIN</b>	
Doing business as					
Street		City		State	ZIP Code
Phone number		Date incorporated		State of incorporation	Country of incorporation
Business activity			Product or service		
Accounting method: <input type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other _____					
Accounting period: <input type="checkbox"/> Calendar year <input type="checkbox"/> Fiscal year <input type="checkbox"/> Short tax year				Beginning date	Ending date

## Primary Contact

<b>Name</b>		<b>SSN</b>	<b>Title</b>
<b>Email</b>		<b>Phone</b>	

## Officer Information

<b>Name</b>		<b>TIN</b>	<b>Title</b>		
Street		City		State	ZIP Code
Email		Phone		Compensation (\$)	Time devoted to business (%)
<input type="checkbox"/> Signs return	<input type="checkbox"/> Shareholder <i>(complete the following:)</i>	Country of citizenship	Common stock owned (%)	Preferred stock owned (%)	

<b>Name</b>		<b>TIN</b>	<b>Title</b>		
Street		City		State	ZIP Code
Email		Phone		Compensation (\$)	Time devoted to business (%)
<input type="checkbox"/> Signs return	<input type="checkbox"/> Shareholder <i>(complete the following:)</i>	Country of citizenship	Common stock owned (%)	Preferred stock owned (%)	

<b>Name</b>		<b>TIN</b>	<b>Title</b>		
Street		City		State	ZIP Code
Email		Phone		Compensation (\$)	Time devoted to business (%)
<input type="checkbox"/> Signs return	<input type="checkbox"/> Shareholder <i>(complete the following:)</i>	Country of citizenship	Common stock owned (%)	Preferred stock owned (%)	

# C Corporation Tax Organizer

## Questionnaire

<input type="checkbox"/> Yes <input type="checkbox"/> No	Did our firm prepare the 2022 tax return for this business?
<input type="checkbox"/> Yes <input type="checkbox"/> No	Did the business change its legal name?
<input type="checkbox"/> Yes <input type="checkbox"/> No	During the 2023 calendar year, did the corporation have an interest in or a signature or other authority over a financial account in a foreign country?
<input type="checkbox"/> Yes <input type="checkbox"/> No	Did the corporation pay \$600 or more of non-employee compensation to any individual during the year?
<input type="checkbox"/> Yes <input type="checkbox"/> No	Did or will the corporation file required Form(s) 1099?
<input type="checkbox"/> Yes <input type="checkbox"/> No	At any time during the tax year, was any shareholder of the corporation a disregarded entity, a trust, an estate, or a nominee or similar person?
<input type="checkbox"/> Yes <input type="checkbox"/> No	Is the corporation a subsidiary in an affiliated group or a parent-subsiary controlled group?
<input type="checkbox"/> Yes <input type="checkbox"/> No	Does the corporation have an available net operating loss (NOL) from a prior tax year?
<input type="checkbox"/> Yes <input type="checkbox"/> No	At the end of the tax year, did the corporation directly own 20% or more, or directly or indirectly own, 50% or more of the total voting power of all classes of stock entitled to vote of any foreign or domestic corporation not included in an affiliated group?
<input type="checkbox"/> Yes <input type="checkbox"/> No	At the end of tax year, did the corporation directly own an interest of 20% or more, or directly or indirectly own, an interest of 50% or more in any foreign or domestic partnership or in the beneficial interest of a trust?
<input type="checkbox"/> Yes <input type="checkbox"/> No	At any time during the tax year, did one foreign person directly or indirectly own, at least 25% of the total voting power of all classes of the corporation's stock entitled to vote or at least 25% of the total value of all classes of the corporation's stock?
<input type="checkbox"/> Yes <input type="checkbox"/> No	During this tax year, did the corporation have an 80%-or-more change in ownership, including a change due to redemption of its own stock?
<input type="checkbox"/> Yes <input type="checkbox"/> No	During or subsequent to this tax year, but before the filing of this return, did the corporation dispose of more than 65% (by value) of its assets in a taxable, non-taxable, or tax deferred transaction?
<input type="checkbox"/> Yes <input type="checkbox"/> No	Did the corporation receive assets in a property-for-stock nontaxable exchange in which any of the transferred assets had a fair market basis or fair market value of more than \$1 million?
<input type="checkbox"/> Yes <input type="checkbox"/> No	Is the corporation operating on a cooperative basis?
<input type="checkbox"/> Yes <input type="checkbox"/> No	At the end of the tax year did any foreign or domestic corporation, partnership, trust, or tax-exempt organization directly own 20% or more, or directly or indirectly own, 50% or more of the total voting power of all classes of the corporation's stock entitled to vote?
<input type="checkbox"/> Yes <input type="checkbox"/> No	At the end of the tax year did any individual or estate directly own 20% or more, or directly or indirectly own, 50% or more of the total voting power of all classes of the corporation's stock entitled to vote?

# C Corporation Tax Organizer

Income			
Gross receipts or sales	\$	Gross royalties	\$
Returns and allowances	\$	Capital gain net income	\$
Dividends	\$	Net gain (loss)	\$
Interest	\$	Other income	\$
Gross rents	\$		

Cost of Goods Sold (COGS)			
Beginning of year inventory	\$	Other costs	\$
Purchases	\$	End of year inventory	\$
Cost of labor	\$	Inventory method:	

Expenses			
Advertising	\$	Office expenses	\$
Automobile expense	\$	Pension and profit sharing plans	\$
Bad debts	\$	Postage and shipping	\$
Bank charges	\$	Professional education and training	\$
Charitable contributions	\$	Rent or lease (car, machinery, equipment)	\$
Compensation of officers	\$	Rent or lease (other business property)	\$
Cleaning and janitorial	\$	Repairs and maintenance	\$
Contract labor	\$	Salaries and wages (other than to officers)	\$
Dues and subscriptions	\$	Software	\$
Employee benefit programs	\$	Supplies	\$
Entertainment	\$	Taxes (payroll)	\$
Healthcare plans	\$	Taxes (local and property)	\$
Insurance (other than health)	\$	Taxes (other)	\$
Interest	\$	Telephone	\$
Internet	\$	Tools	\$
Legal and professional services	\$	Travel	\$
Licenses and permits	\$	Utilities	\$
Meals	\$	Other expenses	\$

# C Corporation Tax Organizer

Balance Sheet			
Assets		Liabilities and equity	
Cash and bank accounts	\$	Accounts payable	\$
Trade notes and accounts receivable	\$	Payables less than one year	\$
Inventories	\$	Loans from shareholders	\$
Loans to shareholders	\$	Payables more than one year	\$
Mortgages and loans held by corporation	\$	Other liabilities	\$
Stock, bonds, and securities	\$	Capital stock (preferred)	\$
Other assets	\$	Capital stock (common)	\$
		Additional paid-in capital	\$
		Retained earnings	\$

Asset Listing (non-inventory assets costing more than \$2,500)						
Complete if acquired during 2023			Complete if sold or disposed of during 2023			
	Description of property	Date acquired	Cost	Date sold or disposed	Sale price	Expenses of sale
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						

# C Corporation Tax Organizer

Shareholder Information					
Shareholder name		TIN		Shareholder type	
Street		City		State	ZIP Code
Email	Phone		Country of citizenship or organization		Voting stock owned (%)
Shareholder name		TIN		Shareholder type	
Street		City		State	ZIP Code
Email	Phone		Country of citizenship or organization		Voting stock owned (%)
Shareholder name		TIN		Shareholder type	
Street		City		State	ZIP Code
Email	Phone		Country of citizenship or organization		Voting stock owned (%)
Shareholder name		TIN		Shareholder type	
Street		City		State	ZIP Code
Email	Phone		Country of citizenship or organization		Voting stock owned (%)
Shareholder name		TIN		Shareholder type	
Street		City		State	ZIP Code
Email	Phone		Country of citizenship or organization		Voting stock owned (%)
Shareholder name		TIN		Shareholder type	
Street		City		State	ZIP Code
Email	Phone		Country of citizenship or organization		Voting stock owned (%)
Shareholder name		TIN		Shareholder type	
Street		City		State	ZIP Code
Email	Phone		Country of citizenship or organization		Voting stock owned (%)
Shareholder name		TIN		Shareholder type	
Street		City		State	ZIP Code
Email	Phone		Country of citizenship or organization		Voting stock owned (%)

