



C-Corporation Tax Return Checklist

- Prior Year Tax Return, if applicable. If no prior tax return was filed, provide the following information:
 - Articles of Incorporation (To include State and Date of Formation).
 - Employer Identification Number Letter, and any other notices received from the IRS.
 - Description of Business Activity and Product or Service.
 - Confirmation of Cash, Accrual or Other Accounting Method
- Financial Statements
 - Profit & Loss Statement
 - Balance Sheet
 - List of Dividends Payments (Form 1099-DIV to be filed)
- List of assets (property & equipment) purchased during the current year to include the date and dollar amount or purchase.
- List of Officers as well as Shareholders who own more than 20% of the corporation. Include their full name, address, SSN, time devoted to business, and percentage of shares owned.
- Capitalization table to include a list of outside investors, common stock and preferred stock.

Please note, this questionnaire is not a comprehensive list of all required information, and additional documentation may be required.