



Corporate Tax Return Checklist

- IRS Employer Identification Number Letter.
- Articles of Incorporation (To include State and Date of Formation).
- Description of Business Activity and Product or Service.
- Confirmation of Accrual Accounting Method, or other.
- Financial Statements
 - Profit & Loss Statement
 - Balance Sheet
 - Report of Dividends/Distributions Paid
- 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
- Documents filed with the IRS, and state, if the corporation has elected to file as a subchapter S-Corporation (Form 2553), or other election (Form 8832) if applicable.
- Entity Classification Letter and other correspondence issued from IRS, if applicable.

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