



S-Corporation Tax Return Checklist

- Copies of prior year Federal and State tax returns, if applicable. For first-year tax return preparation, provide the following:
 - Articles of Incorporation (To include State and Date of Formation), or entity formation documents (i.e. LLC formation documents).
 - Description of business activity and principal product or service.
 - Employer Identification Number (SS-4 Letter issued from the IRS).
 - Documents filed and accepted by the IRS and the state if the corporation has elected to file as a subchapter S corporation (Form 2553), if applicable.
 - Confirmation of Cash, Accrual or Other Accounting Method.
- List of all Shareholders to include their name, address, SSN, and percentage of the ownership interest at the beginning of the year, and at the end of the year.
- Financial Statements
 - Profit & Loss Statement
 - Balance Sheet
 - List of Contributions by Each Shareholder
 - List of Distributions to Each Shareholder
- List of assets (property & equipment) purchased during the current year to include the date and dollar amount or purchase.

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