

2024 Tax Organizer for Corporations Business Information

Business Information

Corporation's legal name			EIN	
Doing business as name				
In care of name				
Street address, city, state, and ZIP				
Email				
Phone number		Date of S corporation election		
Cell number		Date incorporated		
Fax number		State of incorporation		

Yes No

☐☐

Does the corporation file under a calendar year?

If "No," what is the tax year begin date? _____

Tax year end date? _____

☐☐

Is this the corporations final year?

☐☐

Did the corporation conduct business activities in any state other than the resident state?

If "Yes," what states? _____

What is the corporation's main business activity? _____

What product or service does the corporation provide? _____

What accounting method does the corporation use? _____

☐

Cash

☐

Accrual

Other (describe) _____

How many shareholders did the corporation have during the year? _____

Estimates

	Federal		Resident State		Resident City	
	Date Paid	Amount	Date Paid	Amount	Date Paid	Amount
Overpayment applied from 2023	_____	_____	_____	_____	_____	_____
First quarter	_____	_____	_____	_____	_____	_____
Second quarter	_____	_____	_____	_____	_____	_____
Third quarter	_____	_____	_____	_____	_____	_____
Fourth quarter	_____	_____	_____	_____	_____	_____
Additional payments	_____	_____	_____	_____	_____	_____

Account Information for Deposits and Withdrawals

Name of Bank	Bank Routing Number	Bank Account Number	Type of Account		Use This Account for	
			Checking	Savings	Deposits	Withdrawals

2024

Shareholder and Officer Information

Corporation Name: _____

EIN:

[illegible]

2024

Change In Ownership Information

Corporation Name:

EIN:

[illegible]

2024

Asset Listing for 2024

Corporation Name:

EIN:

Assets for:[illegible]

2024

Auto Expense

Corporation Name: _____

EIN: _____

Auto Expense

Name of activity vehicle is used for _____

Description of vehicle _____

Date vehicle was placed in service _____

Yes No

☐☐

Was this vehicle available for personal use during off-duty hours?

☐☐

Was the vehicle used primarily by someone with more than 5% ownership or a related person?

☐☐

Was another vehicle available for personal use?

Number of miles the vehicle
was driven during 2024

2024

2023

Total number of miles the vehicle
was driven in prior years

2024

2023

Business _____

Business _____

Commuting _____

Total _____

Other _____

Expenses

Garage rent _____

Repairs _____

Gas _____

Tires _____

Insurance _____

Tolls _____

Licenses _____

Lease addback _____

Oil _____

Other expenses

Parking fees _____

Rental fees _____

Interest _____

Property tax _____
