

2024 Tax Organizer for Partnerships Business Information

Partnership Information

Partnership's legal name		EIN	
Doing business as name			
In care of name			
Street address, city, state, and ZIP			
Email			
Phone number		Cell number	
Fax number		Date business started	

Yes **No**
☐ ☐ Does the partnership file under a calendar year?
 If "No," what is the begin date? _____ End date? _____
☐ ☐ Did the partnership conduct business activities in any state other than the resident state?
 If "Yes," what states? _____
☐ ☐ Is this the partnership's final year in business?
 What accounting method does the partnership use?
 ☐ Cash ☐ Accrual Other (describe) _____
 What is the partnership's principal business activity? _____
 What product or service does the partnership produce? _____
 Number of partners at any given time during the year? _____
 What type of entity is the partnership filing as?
 ☐ Domestic general partnership ☐ Domestic limited partnership
 ☐ Domestic LLC ☐ Domestic limited liability partnership
 ☐ Foreign partnership ☐ Other (describe) _____

Partnership Representative or Designated Individual (if the representative is an entity)

Representative name			
Street address, city, state, and ZIP			
Phone number		Email	

Estimates

	Resident State		Resident City	
	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	Deposit	Withdrawal

2024

Partner Information

Partnership Name:

EIN:

[illegible]

2024

Change In Ownership Information

Partnership Name:

EIN:

[illegible]

2024

Asset Listing for 2024

Partnership Name:

EIN:

Assets for:[illegible]

2024

Partner's Capital Account Information

Partnership Name:

EIN:

[illegible]