



Business Tax Organizer (2025 Tax Year)

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Corporations, Partnerships or LLC's treated as such
(not sole proprietorships)

How are you providing copies of business income/expenses?

☐ QuickBooks file password: _____

(Required statements: Profit & Loss and Balance Sheet)

☐ Financial Statements

Legal Name: _____

EIN # _____

Dba (if applicable): _____

Tax entity type ☐ C Corporation ☐ S Corporation ☐ Partnership (If an LLC, please check the tax entity)

☐ Yes ☐ No Did the business have a change in name during the year?

Business address: _____

Owner responsible for signing tax return: _____

Email: _____ Phone: _____

Principal business activity: _____

Principal product or service: _____

Do you want a soft copy uploaded to the portal, a physical return, or both? Soft Copy Physical Copy Both

If you want a physical copy, do you want to pick it up or have it mailed? Pick up mailed (\$15 fee applies)

☐ Yes ☐ No Was the primary purpose of the corporation's activity to realize a profit?

☐ Yes ☐ No If a Corporation or LLC, is the Corp/LLC a Personal Service Corporation (PSC/PLLC)? Does the corporation file under a calendar year? (if no, what is the fiscal year? _____)

☐ Yes ☐ No Did you file the BOI FINCEN report for this entity? (Please consult your attorney to see if you are required.)

NEW CLIENTS

Provide a copy of the Articles of Incorporation, bylaws, Operating Agreements and any corporate resolutions.

Provide a copy of the depreciation schedules for book, tax, and AMT, and copies of tax returns for last two years, including state returns.

Principal Ownership Information (include all owners if owned any portion, at any part of the year; include additional sheets as necessary)

Name/Title	Tax ID number (SSN or EIN)	Address	# Shares or % owned beg. of year	# Shares or % owned end. of year	Dividends issued (if C Corp)	U.S. Citizen?



Company: _____

How many shareholders were there on the last day of the year? _____

Please provide the following information for each shareholder that owned any interest at any point during the year.

Shareholder/Owner	Wages paid or Guaranteed payments	Health insurance premiums paid by the business	Contributions made during the year	Distributions made during the year	Owner loans made to the business?	Company loans made to Owners?

Company Specific Questions

- ☐ Yes ☐ No Did the corporation hold an annual meeting with shareholders with a record of minutes maintained?
- ☐ Yes ☐ No Is the business a subsidiary in an affiliated group or a parent-subsidary controlled group?
- ☐ Yes ☐ No Are there any foreign owners? If yes, please provide details.
- ☐ Yes ☐ No Did the business make any contributions to qualified charities? If yes, please provide all statements from charity.
- ☐ Yes ☐ No Did the business own directly a portion of any other business? If yes, provide details.
- ☐ Yes ☐ No Did the business have any debt that was cancelled during the year? If yes, provide details.
- ☐ Yes ☐ No Does the business have a retirement plan? Or a plan to make contributions to a self-employed retirement plan?
- ☐ Yes ☐ No Did the company receive or dispose/transfer any assets, furniture, vehicles, etc or stock to another company, individual, or shareholder during the year?
- ☐ Yes ☐ No Did the business have any bartering transactions during the year?
- ☐ Yes ☐ No At any time during the year, did the corporation have an interest in, or signature authority over a financial account in a foreign country?
- ☐ Yes ☐ No Was there a distribution of property or a transfer (by sale or death) of a shareholder's interest during the year?
- ☐ Yes ☐ No At any time during the year, did the business engage in any virtual currencies transactions, buy/sell or otherwise acquire? If so, provide details.
- ☐ Yes ☐ No Are all owners/shareholders actively participating in the business?
- ☐ Yes ☐ No Did the business receive any IRS or State letters or notifications during th year that we should be aware of? If yes, please provide copies.
- ☐ Yes ☐ No Did the business pay for health/dental insurance for any owners? If so, please provide amounts and names for each owner in the box above for each shareholder.

General Business Credits

- ☐ Yes ☐ No Did the business pay expenses to make it accessible by individuals with disabilities?
- ☐ Yes ☐ No Did the business pay any FICA on employee wages for tips above minimum wage?
- ☐ Yes ☐ No Did the business own any residential rental buildings providing a qualified low-income housing?
- ☐ Yes ☐ No Did the business incur any research and experimental expenditures during the year?
- ☐ Yes ☐ No Did the business have employer pension plan start-up costs?
- ☐ Yes ☐ No Did the business hire any workers from hardship categories?
- ☐ Yes ☐ No Would you like to authorize your tax preparer to speak to the IRS if there is a question regarding your tax filing? If so, which preparer _____. This is not authorization for IRS audit services or IRS Collections, which requires an IRS Power of Attorney.



Company: _____

Company Specific Questions (cont)

Vehicle Expenses

Please provide the vehicle worksheet (www.steadmantax.com/downloads)

- ☐ Yes ☐ No Does the company own vehicles directly (ie Titled in the business name)? If so, provide details
- ☐ Yes ☐ No Does the company reimburse employees for use of their personal vehicles? If so please answer below.
- ☐ Yes ☐ No Does the company, if a corporation (S-Corporation or C-Corporation) have a written accountable plan explaining the policy for required reimbursements under IRS Sec. 62(a)(2)(A) and Regs. Sec 1.62-2.
- ☐ Yes ☐ No Were all required documents maintained by the company and paid within the required time frame?

Meals (Entertainment is no longer a tax deduction; however qualified meals are allowed with proper logs and documentation)

- ☐ Yes ☐ No For any business meals expenses, does the company keep **proper meal log** records including all (5) of the following: business purpose and relationship, dates, amount, and who attended each event, and location?

Travel Expenses

- ☐ Yes ☐ No Did the company have business travel expenses for the year?
- ☐ Yes ☐ No Were all travel expenses accounted for properly and **separated** into travel, lodging, transportation and meals?

Company Financial Information

- ☐ Yes ☐ No Does Steadman Tax Services provide monthly bookkeeping services to your entity? (not payroll only)
☐ Skip If yes, mark skip, and **STOP HERE**, if no, Continue
- ☐ Yes ☐ No Did the corporation pay \$600 or more to any individual or company, via check, cash or any type of online ach payment such as paypal, venmoetc? If yes, include a copy of Form 1099s Note: Requirements to issue a 1099 to companies and/or individuals is provided in IRS instructions for Form 1099s. Amounts paid with a credit/debit card are not required. Typically payments made by cash, check, billpay, or certain paypal transactions will require a 1099 to be issued, to include payments to insurance agents and for rent payments.
- ☐ Yes ☐ No Did you have any employees? Please provide copies of 941s and W2/W3 for the year.
You may upload copies of the quarterly payroll reports and W2s or drop them off at our office.
- ☐ Yes ☐ No Have you provided company financial statements as of the end of the fiscal year (typically Dec 31st?)
Income statement and Balance sheet; these statements should tie to your beginning balance as of January 1st and your last year's tax return. Backup QB file fully reconciled or complete financials (P&L and Balance sheet).
- ☐ Yes ☐ No Are all bank statements reconciled and match balances in accounting software?
- ☐ Yes ☐ No Are all credit card statements reconciled and match to balances in the accounting software?
- ☐ Yes ☐ No Are all loans and line of credits reconciled and match to the statements?
- ☐ Yes ☐ No Did the business purchase or sell any real estate during the year? If so, provide closing documents (HUD)
- ☐ Yes ☐ No Did the business purchase any vehicles or other assets? If so, provide purchase documents and original loan information.
- ☐ Yes ☐ No Did the business sell or dispose of any company assets during the year? If so, please provide details of sale.
- ☐ Yes ☐ No Does the business have inventory? If yes, provide details of beginning and ending inventory, purchases, and other cost of goods related items.

If you are unable to provide any of the above requested items, please provide details as to the circumstances.
