

**Please provide the following information regarding your business:**

**General Questions:**

Question:	Provide Answer Here:
S Election Effective Date (when did it start)	
Business Activity Code Number (if known, from prior return)	
Legal Business Name	
Legal Business Address	
Employer Identification Number	
Date Incorporated	

**Officer Information:**

Officer 1 Name	
Social Security Number	
Shareholder Address	
Telephone Number	
Ownership and Participation/ Percentage of Ownership (Common and Preferred Stock Percentage)	
Officers Compensation	

Officer 2 Name	
Social Security Number	
Shareholder Address	
Telephone Number	
Ownership and Participation/ Percentage of Ownership (Common and Preferred Stock Percentage)	
Officers Compensation	

Officer 3 Name	
Social Security Number	
Shareholder Address	
Telephone Number	

Ownership and Participation/ Percentage of Ownership (Common and Preferred Stock Percentage)	
Officers Compensation	

### Assets:

Description	Date Acquired	Cost	Fair Market Value	Date Sold

### Debts:

Creditor	Balance Owed	Interest	Liens

### Income/Gross Profit Calculation:

Gross Income		
Cost of Goods Sold		
Returns, Allowances, Discounts		

## Business Expenses:

Beginning Inventory		Ending Inventory	
Merchandise Purchased for Resale		Advertising	
Bank Charges		Commissions	
Dues and Publications		Freight/Delivery/Postage	
Insurance		Mortgage Interest	
Legal/Professional Fees		Rent	
Repairs		Taxes	
Entertainment		Telephone	
Utilities		Wages	
Seminars		Travel Expenses	

\*Please provide trail balance for each business

## Additional Information Needed:

- **Please provide prior year 1065 or 1120S tax return**
- **Please provide Profit and Loss Statement and Balance Sheet**