

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]

Change In Ownership Information

Corporation Name: _____

EIN:

[illegible]

Rental Other Than Real Estate

Corporation Name:

EIN:

General Property Information

Description of property

Address of property

City State ZIP

This property was placed in service during tax year 2024.

This property was disposed of during tax year 2024.

Income and Expenses

2024

Gross rental income

Advertising

Auto and travel

Cleaning and maintenance

Commissions

Insurance

Legal and other professional fees

Interest

Repairs

Taxes

Utilities

Wages and salaries

Other expenses (list)

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Rental Real Estate

Corporation Name:

EIN:

General Property Information

Select the property type

- ☐ Single family residence ☐ Multi-family residence ☐ Vacation ☐ Commercial
☐ Land ☐ Royalties ☐ Self-rental ☐ Other

Description of property if the property type is "Other" _____

Address of property _____

City _____ State _____ ZIP _____

Foreign province _____ Country _____ Postal code _____

Number of days property was rented _____ Number of days property was used for personal use _____

- ☐ This property was placed in service during tax year 2024.
☐ This property was disposed of during tax year 2024.

Income and Expenses

2024

Gross rental or royalty income _____

Advertising

Auto and travel

Cleaning and maintenance.

Commissions

Insurance

Legal and other professional fees

Interest _____

Repairs.

Taxes

Utilities

Wages and salaries

Meals and entertainment.

Other expenses (list)

2024

Asset Listing for 2024

Corporation Name: _____

EIN:

Assets for:[illegible]

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?

Miles the vehicle was driven during 2024

2024 Amount

Business

Commuting

Other

Miles the vehicle was driven in prior years

2024 Amount

Business

Total

Expenses

Garage rent

Gas

Insurance

Licenses

Oil

Parking fees

Rental fees

Interest

Property tax

Repairs

Tires

Tolls

Lease addback

Other expenses

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2024

Income or Loss from Investments in Fiduciaries and Partnerships

Corporation Name: _____

EIN:

Schedule K-1 from Fiduciaries and Partnerships

Provide all copies of Schedule K-1 and attachments

[illegible]

Sale of Stock, Real Estate, or Other Property

Corporation Name: _____

EIN:

Sale of Capital Assets (including items not reported on Form 1099-B)

Provide all brokerage statements

[illegible]

Installment Sale Income

Description of property: _____

Date acquired		Date sold		2024	Prior Years
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Selling price _____

Mortgages assumed	
-----------------------------	--

Cost of property sold

Depreciation allowed

Commissions and expense of sale		
---------------------------------	-------	--

Gross profit percentage		
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Interest received

Principal payments received

Property was sold to a related party ☐