



# C Corporation Tax Organizer

Use a separate organizer for each C corporation

## C Corporation General Information

Legal name of C corporation		EIN
C corporation address <input type="checkbox"/> (check if new address)		
Date incorporated	State of incorporation	Corp. state residence
Corporation Representative	Title	
	Email	Phone
Yes No	Did the corporation have a change of business name during the year?	
Principal business activity		
Principal product or service		
Yes No	Was the primary purpose of the corporation's activity to realize a profit?	
Yes No	Is the corporation a Personal Service Corporation (PSC)?	
Accounting method: <input type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify)		
Yes No	Does the corporation file under a calendar year? (If no, what is the fiscal year?)	
\$	Total assets of the corporation at the end of the tax year. If there are no assets at the end of the tax year, enter 0.	
<b>New Clients</b>	<ul style="list-style-type: none"> <li>• Provide a copy of the Articles of Incorporation, bylaws, corporate resolutions, and shareholder buy-sell agreements.</li> <li>• Provide a copy of the depreciation schedules for book and tax, and copies of tax returns for last three years, including state returns.</li> </ul>	

## C Corporation Specific Questions

Yes No	Has the corporation been notified of any changes to previous returns by any taxing authority? If yes, provide copies of all correspondence.
Yes No	Provide a schedule of ownership changes during the year, including dates and number of shares or percentage of ownership.
Yes No	Have there been any changes to the shareholder's buy-sell agreements? If yes, provide a copy.
Yes No	Did the corporation hold an annual meeting with shareholders with a record of minutes maintained?
Yes No	Has the corporation updated its minute book for the year? If yes, provide a copy.
Yes No	Did the corporation purchase or sell a business or business segment during the year? If yes, provide a copy of the contract or agreement.
Yes No	Did the corporation engage in any new activities during the year? If yes, describe the new business on an attached sheet.
Yes No	Did the corporation discontinue operations this year? If yes, provide details.