



TARYLE ACCOUNTING, CPA PLLC
CERTIFIED PUBLIC ACCOUNTANT

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Business Tax Return Organizer

Please complete a separate organizer for each entity requiring a tax return.

This form is only for S Corporations, C Corporations and Partnerships (including LLCs taxed as S Corporations, C Corporations or Partnerships)

If this business is being treated as a Sole Proprietorship (this includes Single Member Disregarded LLCs), please do not use this form; instead, use the Sole Proprietorship organizer.

Your name: _____ Phone: _____ Email: _____

Name of business entity: _____ EIN: _____

Type of Business: Partnership C Corporation S Corporation LLC*
(if checked, complete next line)

*If LLC, what is the tax treatment? Partnership C Corporation S Corporation Not Sure

What is the year end of this business? _____

QuickBooks Username: _____ Password: _____

Did you make any payments in 2017 that would require you to file Form 1099? _____
If yes, did you or will you file all required forms? _____

Special Note: Please understand that just because you may believe you have a business, it does not mean that the IRS will believe that you have a business. In order for this activity to be considered a business by the IRS, you must have a profit motive. The IRS determines your motive based mainly on 9 objective standards. If your business has a loss and especially if the business had little or no income, your profit motive may be questioned. For more information, go to <http://www.tacpas.com/tax-think-videos> and watch my video "Is Your Business a Business".

Cell Phone Expense

This is another area that the IRS is focusing on. Cell phone expenses must be apportioned for business and personal use. The IRS does not believe that cell phones are used 100% for business unless you have a separate cell phone for each. We must report the personal and business use percentage on the tax return. These percentages should be supported by a written record such as your cell phone bills with calls marked as business or personal.

Total Cell Phone Expenses: _____
Business %: _____ Personal %: _____

Car and Truck Expenses

If you used a car or truck in this business, please complete the *Car and Truck Expense organizer*.

Electronic payment of C Corporation Tax Liability (attach copy of void corporate check)

Banks no longer accept 8109 coupons with Federal corporation/payroll tax payments. Payments must be made by an electronic method, such as EFTPS or electronic bank draft.

Please send us a copy of the following:

- Backup of QuickBooks file (Preferred) or printout of Balance Sheet Report, Profit & Loss Report, and General Ledger or detailed transaction report. If not available please contact us.
 Attached Sending N/A
- Copies of Year End bank statement
 Attached Sending N/A
- Copies of Year End credit cards statements
 Attached Sending N/A
- Copies of Year End loan statements
 Attached Sending N/A
- Copies of the following, if applicable:
 - Annual Minutes
 - Promissory Notes
 - Copy of Business License
 - Payroll Registers and Quarterly & Annual Federal and State Payroll Reports Attached Sending N/A
- Copies of form 1099s including form 1099-K issued to your business
 Attached Sending N/A
- Complete the attached New Assets Acquired Sheet if your business purchased or leased any equipment, furniture, vehicles, fixtures or real estate.
 Attached Sending N/A

Is this the first time for us to prepare this return?

YES NO

If yes, also send us the following (if not already in our possession):

- Copies of organizational documents including:
 - Articles of Incorporation
 - Initial Minutes
 - Stock Certificates
 - Application for Employer Identification number
 - IRS letter granting Employer Identification number
 - IRS letter accepting 8832 corporation election (if applicable)
 - IRS letter accepting 2553 small business corporation (S corp.) election (if applicable)

- Copies of prior years' tax returns (if not already in our possession)

- Depreciation schedule from prior tax preparer
 - Attached Sending N/A

