

## **S – CORPORATION TAX ORGANIZER**

- 1. Copies of prior year return**
- 2. Details of change in stock ownership**
- 3. For each shareholder provide ID#, compensation, % of ownership, time devoted to business, date ownership acquired and distributions received.**
- 4. List fringe benefits paid on behalf of more than 2% shareholders**
- 5. List all loans to/ from shareholders, officers and related parties including interest rates and payment schedules.**
- 6. Schedules of built in gains.**
- 7. Detailed analysis of entries in prepaid, accrued, income tax accounts**
- 8. Copies of Forms 1099, 941, 940, 5500, 1042, W-2 you have filed.**
- 9. Schedules of all interest and dividend income.**
- 10. Schedules of assets bought and/ sold during the year including the dates; trade in allowance, purchase price.**
- 11. Copy of the inventory uniform capitalization calculations.**
- 12. Schedule of contributions.**
- 13. Mileage data and vehicle details of company cars and trucks.**
- 14. Meal and entertainment expense data.**
- 15. List of activities conducted in other states.**
- 16. Details of miscellaneous income/ expense accounts.**
- 17. List of insurance premiums.**