



CERTIFIED PUBLIC ACCOUNTANTS

Tax Organizer Business Entities

Tax Year 2016

Business Name: _____

E-mail Address: _____ (Primary Electronic ShareFile Contact)

Please provide details for any item answered yes.

Yes No

All taxpayers answer the following questions:

- Did the business entity receive any government tax notices or correspondence during the year? If so, please forward copies to us if not previous sent.
- Did the business entity have an interest in or signature authority over a foreign financial account? *If yes, please fill out the attached spreadsheet. (Information required by February 6, 2017.)*
- Does the business entity currently benefit from any type of tax credits?
- Did the business entity's workforce change in total numbers?
- Were there any changes in ownership or ownership allocations?
- Was medical insurance paid on behalf of any owners by the business entity?
- Did the business entity maintain a life insurance policy for any owner or key employees?
- Were there fixed asset purchases or disposals during the year?
- Were there any substantial or unusual transactions during the year?
- Were there any changes in business activities during the year?
- Does the business entity use accounting software to keep financial records?
- Did the business entity enter into or settle any litigation claims during the year?
- Did the owner(s) use the business entity's auto(s) for personal purposes?
- Does the business entity currently have a retirement plan?
- Did the business entity record a pension contribution?
- Was sales/use tax paid on out of state purchases?
- If the business entity has inventory, was there a change in determining quantities, cost or valuations between opening and closing inventory?
- Did the business entity perform a physical count of inventory at year end?
- Does the business entity have any long-term contracts?

- Did you pay \$600 or more to any one individual or entity?
- If yes, did you file Form 1099 and Form 1096?

For Corporate Taxpayers:

- Did this corporation receive any dividends from other corporations?
- At the end of the tax year, did the corporation own, directly or indirectly, 50% or more of the voting stock of a domestic corporation?
- At the end of the tax year, did any individual, partnership, corporation, estate or trust own, directly or indirectly, 50% or more of the corporation's voting stock?
- Was the corporation a U.S. shareholder of any controlled foreign corporation, or was the corporation owned by a foreign corporation?
- If a C-Corporation, were dividends paid to stockholders?

Any Additional Relevant Information: _____

