

Tax Prep Checklist (C-Corp.)

Created with care by
Paige Financial Services



Shareholder Information

- ☐ Name, address, and SSN/EIN of shareholders (owning 20% or more of company's stock) during the year
- ☐ Information regarding the number of shares outstanding
- ☐ Information regarding any distributions of cash or property to shareholders



Documents to Collect



- ☐ Copy of the business' bylaws and articles of incorporation
 - (If an LLC taxed as a C-corporation: copies of the LLC operating agreement and articles of organization)
- ☐ Form 8832 if the entity has chosen to be taxed as a C-corporation using the check-the-box regulations
- ☐ List of federal and state employer identification numbers (EINs)
- ☐ Any granted credit certificates
- ☐ Last year's Form 1120 including any schedules of carryover losses, deductions, or credits from prior years and state or local returns
- ☐ Information regarding any dividends received
- ☐ Information regarding the corporation's accumulated earnings account
- ☐ Information regarding any business reorganization or change in ownership that happened during the year



Do you feel confused or need an extra set of eyes? We're here to help! Contact us at 877-229-3829 for support.