

Tax Prep Checklist (S-Corp.)

Created with care by
Paige Financial Services



Shareholder Information

- ☐ Name, address, and SSN/EIN of all shareholders during the year
- ☐ The number of shares that each shareholder owns
- ☐ Information regarding:
 - capital contributions, distributions, or loans to shareholders
 - reasonable compensation paid to any employee/shareholder
 - insurance plan provided to any shareholder
 - changes in ownership throughout the year



Documents to Collect



- ☐ IRS acceptance letter of S election or previously filed Form 2553
- ☐ Copy of the business' bylaws and articles of incorporation
 - (If an LLC taxed as a S-corporation: copies of the LLC operating agreement and articles of organization)
- ☐ List of federal and state employer identification numbers (EINs)
- ☐ If the corporation used to be a C corporation, any information carried over after converting to an S corporation
- ☐ Last year's Form 1120S and Schedule K-1 and any state or local returns



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