

## 2023 Tax Organizer for Corporations Business Information

### Business Information

Corporation's legal name		EIN	
Doing business as			
In care of name			
Street address, city, state, and ZIP			
Email			
Phone number	Cell number	Fax number	
Date incorporated	State of incorporation		

**Yes No**

- Does the corporation file under a calendar year?  
If "No," what is the tax year begin date? \_\_\_\_\_ Tax year end date? \_\_\_\_\_
- Did the corporation conduct business activities in any state other than the resident state?  
If "Yes," what states? \_\_\_\_\_
- Is this a consolidated return?  
If "Yes," is this a life / nonlife consolidated return? \_\_\_\_\_
- Is the corporation a personal holding company?
- Is the corporation a personal service corporation?
- Is the corporation a qualified personal service corporation?
- Is the corporation a cooperative association?
- Is the corporation a homeowners association?
- What is the corporation's main business activity? \_\_\_\_\_
- What product or service does the corporation provide? \_\_\_\_\_
- What accounting method does the corporation use?  
 Cash  Accrual  Other (describe) \_\_\_\_\_
- What is the corporation's principal business activity? \_\_\_\_\_
- What product or service does the corporation provide? \_\_\_\_\_
- Is the corporation a subsidiary in an affiliated group or a parent-subsidiary controlled group?  
If "Yes," provide the following information for the parent corporation  
Employer ID number \_\_\_\_\_  
Name \_\_\_\_\_

### Estimates

	Federal		Resident State		Resident City	
	Date Paid	Amount	Date Paid	Amount	Date Paid	Amount
Overpayment applied from 2022	_____	_____	_____	_____	_____	_____
First quarter	_____	_____	_____	_____	_____	_____
Second quarter	_____	_____	_____	_____	_____	_____
Third quarter	_____	_____	_____	_____	_____	_____
Fourth quarter	_____	_____	_____	_____	_____	_____
Additional payments	_____	_____	_____	_____	_____	_____

### Account Information for Deposits and Withdrawals

Name of Bank	Bank Routing Number	Bank Account Number	Type of Account		Use This Account for	
			Checking	Savings	Deposits	Withdrawals









### Auto Expense

Corporation Name: \_\_\_\_\_

EIN: \_\_\_\_\_

#### Auto Expense

Name of activity vehicle is used for \_\_\_\_\_

Description of vehicle \_\_\_\_\_

Date vehicle was placed in service \_\_\_\_\_

Yes No

Was this vehicle available for personal use during off-duty hours?

Was the vehicle used primarily by someone with more than 5% ownership or a related person?

Was another vehicle available for personal use?

Miles the vehicle was driven during 2023		2023 Amount	Miles the vehicle was driven in prior years		2023 Amount
Business	.....	_____	Business	.....	_____
Commuting	.....	_____	Total	.....	_____
Other	.....	_____			

#### Expenses

Garage rent	.....	_____	Repairs	.....	_____
Gas	.....	_____	Tires	.....	_____
Insurance	.....	_____	Tolls	.....	_____
Licenses	.....	_____	Lease addback	.....	_____
Oil	.....	_____	Other expenses		
Parking fees	.....	_____		_____	_____
Rental fees	.....	_____		_____	_____
Interest	.....	_____		_____	_____
Property tax	.....	_____			

