

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	.....	_____		

2023 Tax Organizer for Corporations Business Information

Business Information

Corporation's legal name		EIN	
Doing business as name			
In care of name			
Street address, city, state, and ZIP			
Email			
Phone number		Date of S corporation election	
Cell number		Date incorporated	
Fax number		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? _____

Is this the corporations final year?

Did the corporation conduct business activities in any state other than the resident state?
 If "Yes," what states? _____

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) _____

How many shareholders did the corporation have during the year? _____

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

Shareholder and Officer Information

Corporation Name:

EIN:



Shareholder or Officer Name Address City, State, and ZIP	ID Number	Title	Shares at Start of Year	Percentage of Ownership and Participation				Officer Compensation
				Total	Common	Preferred	Time	

Rental Real Estate

Corporation Name:

EIN:

General Property Information

Select the property type

- Single family residence, Multi-family residence, Vacation, Commercial, Land, Royalties, Self-rental, Other

Description of property if the property type is "Other"

Address of property

City, State, ZIP

Foreign province, Country, Postal code

Number of days property was rented, Number of days property was used for personal use

- This property was placed in service during tax year 2023. This property was disposed of during tax year 2023.

Income and Expenses

2023

Table with columns for expense categories (Gross rental or royalty income, Advertising, Auto and travel, etc.) and a column for the year 2023.

Rental Other Than Real Estate

Corporation Name: _____

EIN: _____

General Property Information

Description of property _____

Address of property _____

City _____ State _____ ZIP _____

This property was placed in service during tax year 2023.

This property was disposed of during tax year 2023.

Income and Expenses

2023

Gross rental income _____

Advertising _____

Auto and travel _____

Cleaning and maintenance _____

Commissions _____

Insurance _____

Legal and other professional fees _____

Interest _____

Repairs _____

Taxes _____

Utilities _____

Wages and salaries _____

Other expenses (list)

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Sale of Stock, Real Estate, or Other Property

Corporation Name: _____

EIN: _____

Sale of Capital Assets (including items not reported on Form 1099-B)

Provide all brokerage statements

Description of Property	Date Purchased	Date Sold	Sales Price	Cost

Installment Sale Income

Description of property: _____

Date acquired _____ Date sold _____

	2023	Prior Years
Selling price	_____	_____
Mortgages assumed	_____	_____
Cost of property sold	_____	_____
Depreciation allowed	_____	_____
Commissions and expense of sale	_____	_____
Gross profit percentage	_____	_____
Interest received	_____	_____
Principal payments received	_____	_____

Property was sold to a related party