



Corporation, LLC & Partnership Organizer

Welcome to the Corporate Organizer for Pilot-Tax. Please make sure this Organizer is complete and all requested material is provided. Only complete the sections that apply to your tax situation. It is important that you answer all questions asked and, if a new client, provide proof of filing and S-Corp election if applicable. If you do not know your type of entity, you can contact your state secretary's office for clarification. Please don't hesitate to call if you would like assistance or have any questions.

Due Date for **C and S Corporate Returns: March 15th**

Due Date for **Partnership Returns: March 15th**

Due Date for **LLC Returns: April 15th**

(unless treated as an S Corp: March 15th)

Important Note: If S Corporation, Partnership, and LLC returns are not filed timely; there is a penalty for late filing of \$195 per shareholder/partner per month for up to twelve months (A maximum penalty of \$2,340 per shareholder/partner). This applies to dormant as well as active businesses. Accordingly, S Corporation/Partnership tax returns must be filed by March 15th; or an extension filed by March 15th and the tax return filed by September 15th. LLC tax returns must be filed by April 15th; or an extension filed by April 15th and the tax return filed by September 15th.

CORPORATE DATA *(Please Print)*

Corporation Name			
Federal ID #			
Address			
City	State	Zip	
Phone #	County		
Fax #	Website		
Email Address	Contact Person		

IMPORTANT QUESTIONS *Please answer all questions.*

Did we prepare your corporate return last year? <i>If no, please provide a copy of the 2015 return.</i>	<input type="checkbox"/> Yes <input type="checkbox"/> No	Are you registering a name change with your corporate filing?	<input type="checkbox"/> Yes <input type="checkbox"/> No
What was the date of incorporation?		Is the address used on this years return different than last year?	<input type="checkbox"/> Yes <input type="checkbox"/> No
What state was the corporation/partnership incorporated/formed?		Is this a final return for this corporation?	<input type="checkbox"/> Yes <input type="checkbox"/> No
If you are an S Corporation, did you file your S Corp election certification?	<input type="checkbox"/> Yes <input type="checkbox"/> No	If this is a final return, have you filed the papers of dissolution?	<input type="checkbox"/> Yes <input type="checkbox"/> No
If yes, what was the date of your S Corp election? <i>Include copy of form 2553.</i>		If you are on a fiscal year, what is the date of your year end?	
How many shareholders does your corporation have? <i>Enter detailed shareholder information on next page.</i>		Do you have a pension or retirement plan for the employees of the corporation?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Total number of shares issued by corporation.	shares	What type of accounting are you using?	<input type="checkbox"/> Cash <input type="checkbox"/> Accrual

Type of Business:

Enter a brief description of your business services or product:

BUSINESS TYPE

- C Corporation (1120)
 S Corporation (1120S)
 Partnership (1065)
 Limited Liability Corporation

CORPORATE OFFICERS

President		Secretary	
Vice President		Treasurer	

NOTE: Please complete shareholder information on the next page for all officers and shareholders.

COMPANY CREDIT CARDS *Please provide copy of 12/31 statements.*

Credit Card Issuer	Balance	Credit Card Issuer	Balance
	\$		\$
	\$		\$
	\$		\$
	\$		\$

YEAR END BUSINESS CHECKING/SAVING ACCOUNT BALANCE *Please provide copy of 12/31 statements.*

Institution Name	Balance	Institution Name	Balance
	\$		\$
	\$		\$
	\$		\$
	\$		\$

OTHER LOANS *Please provide copy of 12/31 statements.*

Does your business have any other notes or loans payable in the company name? For example, a bank loan or line of credit?

Credit Issuer	Balance	Credit Issuer	Balance
	\$		\$
	\$		\$
	\$		\$
	\$		\$

LOANS/CAPITAL CONTRIBUTIONS *from Shareholder to Corporation*

Shareholder Name	Date	Amount
		\$
		\$
		\$
		\$
		\$
		\$

LOAN PAY BACK/DISTRIBUTIONS *to Shareholder from Corporation*

Shareholder Name	Date	Amount
		\$
		\$
		\$
		\$
		\$
		\$

NOTE: **Shareholder Loans** need to be in the form of a written agreement between the Corporation and the Shareholder. This agreement must include the terms of the note including an interest rate in excess of the Applicable Federal Rate. Loan payments for interest are strongly recommended to avoid imputed interest issues.

SHAREHOLDER INFORMATION

Please list all Shareholders or Partners below—be sure to include their % of ownership and Social Security numbers. If we prepared last year's Corporate Return for you and there is no change to the shareholders/partners, their addresses and/or ownership percentages, write "no change".

Name			
Address			
City	State	Zip	
Email	Phone		
Social Security #	% of Ownership		
Name			
Address			
City	State	Zip	
Email	Phone		
Social Security #	% of Ownership		
Name			
Address			
City	State	Zip	
Email	Phone		
Social Security #	% of Ownership		
Name			
Address			
City	State	Zip	
Email	Phone		
Social Security #	% of Ownership		
Name			
Address			
City	State	Zip	
Email	Phone		
Social Security #	% of Ownership		
Name			
Address			
City	State	Zip	
Email	Phone		
Social Security #	% of Ownership		
Name			
Address			
City	State	Zip	
Email	Phone		
Social Security #	% of Ownership		
Name			
Address			
City	State	Zip	
Email	Phone		
Social Security #	% of Ownership		

INCOME

NOTE: If you use QuickBooks or another software package, you may provide a year end Balance Sheet and annual Profit and Loss Statement in lieu of completing the income and expense sections of this page.

Gross receipts or sales	\$	Less included returns and allowances	\$
Gross Rents	\$	Interest (include 1099)	\$
Gross Royalties	\$	Dividends (included 1099)	\$
Gain, if any, from 4684, Line 39			\$
Gain, if any, from 4684, Lines 31 and 38a			\$
Ordinary gain from installment sales—form 6252 line 25 or 36			\$
Recapture of 179 expense deduction			\$

COSTS OF GOODS SOLD/INVENTORY

If you purchase goods to have available for resale or you manufacture goods for resale in your business, you may carry an inventory. Beginning inventory should be the same as ending inventory for the previous tax year. Please include in the cost of inventory purchased during the year only the cost of materials and supplies which became a part of the product which you sell. All other materials and supplies related to your business should be listed separately in the categories below.

Inventory at beginning of year. If different from last year's closing inventory, attach explanation.	\$
Inventory purchased during the year—less cost of items withdrawn for personal use.	\$
Inventory at the end of the year.	\$

GENERAL EXPENSES

Accounting Fees	\$	Employee Health Insurance	\$	Office Supplies	\$
Advertising	\$	Insurance—Other	\$	Professional Fees	\$
Bank Charges/Fees	\$	Interest—Mortgage	\$	Rent	\$
Contract Labor	\$	Interest—Other	\$	Repairs	\$
Commissions and Fees	\$	Internet Fees	\$	Security Costs	\$
Copying Expenses	\$	Legal Fees	\$	Supplies	\$
Credit and Collections	\$	License Fees	\$	Telephone	\$
Dues and Subscriptions	\$	Maintenance	\$	Uniform Expenses	\$
Employee Benefits	\$	Postage, Shipping & Overnight Delivery Expenses	\$	Utilities	\$
Equipment Rental	\$			Website: Creation & Maintenance	\$

PAYROLL EXPENSES

Salaries & Wages—Officers	\$	Payroll Tax	\$
Salaries & Wages—Employees	\$	Other	\$

TAX

Sales Tax	\$	Real Estate	\$
Vehicle	\$	Business Property/Inventory Tax Paid	\$

HOME OFFICE

Home Office expenses are not permitted for corporations and partnerships. If you have questions on this issue, please contact our office.

VEHICLE EXPENSE

Vehicle Description	Owned by Business?	Total Miles	Business Miles	Reimbursed
	<input type="checkbox"/> Yes <input type="checkbox"/> No			<input type="checkbox"/> Yes <input type="checkbox"/> No
	<input type="checkbox"/> Yes <input type="checkbox"/> No			<input type="checkbox"/> Yes <input type="checkbox"/> No
	<input type="checkbox"/> Yes <input type="checkbox"/> No			<input type="checkbox"/> Yes <input type="checkbox"/> No

Use of personal vehicle for company must be reimbursed by the company. Employee/owners CANNOT take a mileage deduction on their personal tax return. Expense reports should be submitted to the corporation for reimbursement at the federal rate which varies per year.

NOTE: Unreimbursed personal use mileage by a company car must be added to officer/employee's W-2.

TRAVEL, MEALS & ENTERTAINMENT

Total Meals <i>Outside of Office</i>	\$	Rental Car	\$	Hotel Expense	\$
Total Meals <i>In Office</i>	\$	Entertainment Expense	\$	Travel—Other	\$

ASSETS/EQUIPMENT PURCHASED

Items Purchased	Date Purchased	Placed in Service	Cost
			\$
			\$
			\$
			\$
			\$
			\$

ASSETS/EQUIPMENT SOLD

Items Sold	Date Sold	Sale Price
		\$
		\$
		\$

PENSION/RETIREMENT PLAN

Do you have an employer provided retirement plan for your Corporation?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Total deductible amount of employer contributions.	\$
Plan administrative costs and fees.	\$

NOTE:

Officers/Shareholders Health Insurance Premiums paid by the S Corp, or reimbursed to the shareholder by the S Corp will be added to the owners' W-2 as wages, allowing the S Corp the deduction for the amount added to the wages.

HSA (Health Savings Accounts) contributions paid for by the S Corp are included on the owner's W-2, allowing the S Corp the deduction.

Reimbursement for expenses to employees and shareholders need to be documented in a written accountable plan in order to qualify as deductions to the Corp.

COMMENTS/ADDITIONAL INFORMATION

Questions? 317-984-7666

Electronic Filing — No additional fee for this service!

Yes! Electronically file my Corporate Return. Some Returns will NOT be able to be electronically filed.

What you need to do: *(yes...it's free)*

1. We will fax you a signature form for efilng.
2. **Not available after September 15th.**

No! I do not want to electronically file my returns.

What you need to do:

1. When you receive your information back from us, sign the federal & state tax returns.
2. (Not explicitly numbered but implied)
3. Mail them in the appropriate envelopes (they will be included with your returns).

Pricing Information

Prices listed are minimum amounts. Additional fees apply for complex returns.

Dormant Corporations no activity, filing for information purposes only	\$199	Dormant Corporation State Return	\$49	Rental Property	\$80 per property
S Corp and Partnership Return	\$399	S Corp and Partnership State Return	\$99	2553 S Corp Election Form	\$50
C Corporation Return	\$799	C Corporation State Return	\$199		

Final return pricing will depend on complexity of the return and time requirements for preparation. Additional fees may be assessed for account "clean-up" and software (Quickbooks) work. All returns must be received by March 1st for possible completion by March 15th.

Payment Method

All preparation and related fees required prior to completion of return.

Check or Money Order Make payable to Pilot-Tax. (\$25.00 charge for all returned checks.)

Credit/Debit Card

Visa MasterCard Discover American Express

(Will appear on your receipt as *Specialty Tax Services, Inc.*)

Card Number

Exp. Date

 /

3 or 4 digit Security Code*

Cardholder Name

Signature of Cardholder

Billing Zip Code

Online Bill Payment via Pilot-tax.com

If you would like to pay by Credit Card online, check the box. Once your return is completed, we will contact you with instructions and the final invoice amount for you to submit payment. This correct amount must be paid prior to the processing of your return with the IRS.

***How to find your security code:**



All Clients MUST Sign Below for Return to be Processed!

I certify that the information provided in this organizer is accurate and complete. I understand it is my responsibility to include any and all information concerning income, deductions and other information necessary for the preparation of my corporate tax return. The forms listed above are the most common forms used. Additional forms not listed may result in per form fees. Administrative fees will apply for more complex returns. I will be responsible for any collection fees due to nonpayment.

Officer Signature

Title

Date

Final Checklist

- Copy of Papers of Incorporation if new Client/Corporation
- Copy of Form 2553 S Election if new Client/Corporation
- Copy of last years return if new client
- Copy of P&L from QuickBooks or Accounting Software for Calendar year of Jan. 1 to Dec. 31 or Fiscal Year.

- Copy of Balance Sheet Report from QuickBooks or Accounting Software for Calendar year of Jan. 1 to Dec. 31 or Fiscal Year.
- Signed Back Page!**
- Payment Information.
- Completed Organizer!**



www.Pilot-Tax.com

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