2022 C-Corporation Tax Information Worksheet

*(*Please return this update with your signed engagement letter)*

Company name: _____

Contact person: _____ Phone number: _____

Physical address: _____

Mailing address: _____

Name & title of officer who will sign the 2022 tax return _____

Yes □ No □	Did the company change locations or add any locations in 2022?
Yes □ No □	Did the company ownership change during 2022? *If so, please provide the dates of changes, description of the change, as well as the names of persons/companies that acquired or sold shares in the company. _____
Yes □ No □	Did the company acquire or dispose of any major assets during 2022? *If so, please provide invoices or bills of sale for asset or vehicle transactions, or closing documents for any real estate transactions.
Yes □ No □	Did the company begin any new lines of business or acquire ownership in another business in 2022? *If so, please describe. _____
Yes □ No □	Did any shareholders/owners make loans to the company during 2022? If so, were promissory notes prepared for each of the loans? Yes □ No □ *If so, please provide copies of the notes.
Yes □ No □	Did the company repay any shareholders loans during 2022?
Yes □ No □	Did the company make payments on any non-shareholder loans during 2022? *If so, please provide loan history or amortization schedule for 2022. If the loan started in 2022, please also provide a copy of the loan documents.
Yes □ No □	During 2022, did the corporation own directly or indirectly at least 20% of the total voting power of all classes of voting stock of any foreign or domestic corporation?
Yes □ No □	During 2022, did the corporation own directly or indirectly an interest of 20% or more in any foreign or domestic partnership, or in the beneficial interest of a trust?
Yes □ No □	At any time during the tax year, did one foreign person own, directly or indirectly, at least 25% of the total voting power of all classes of the corporation's voting stock or of the total value of all classes of the corporation's stock?
Yes □ No □	Did the corporation receive forgiveness of a PPP loan in 2022? Yes □ No □
Yes □ No □	Did the corporation apply for and/or receive the employee retention credit (ERC) in 2022 for tax periods in either 2020 or 2021?
Yes □ No □	Did the shareholder(s) make any capital contributions (cash or noncash) in 2022?
Yes □ No □	Did the corporation distribute any assets (cash or noncash) to shareholders in 2022, other than as payment of salary or expense reimbursement?

*If this is the first year Impact Tax Group is preparing your corporation return, please provide the following:

1. Copies of tax returns from the previous three years.
2. Names, Social Security numbers, addresses, and percentage ownership of all stockholders.
3. Copy of letter from IRS assigning the EIN
4. If you are an LLC that has elected to be treated as a corporation for tax purposes, a copy of the letter from the IRS approving your entity classification election.