2022 S-Corporation Tax Information Worksheet

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

Company name: _____

Contact person: _____

Physical address: _____

Mailing address: _____ Phone number: _____

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 percentage of change, the dates of changes, description of the change, as well as the names of persons 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 ☐	During 2022, did the corporation own directly or indirectly 20% or more of the total stock issued and outstanding of any foreign or domestic corporation?
Yes ☐ No ☐	During 2022, did the corporation own directly or indirectly an interest of 20% or more in the profit, loss or capital in any foreign or domestic partnership or trust?
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 ☐	Did the corporation receive PPP loan forgiveness in 2022?
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 shareholders make any capital contributions (cash or noncash) in 2022?
Yes ☐ No ☐	Did the S-Corporation distribute any assets (cash or noncash) to shareholders in 2022?

*If this is the first year Impact Tax Group is preparing your company 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 S-Corp election acceptance letter from IRS
4. Copy of letter from IRS assigning the EIN