



_____ S CORPORATION TAX QUESTIONNAIRE

GENERAL S CORPORATION INFORMATION

Legal Name

Trade Name/DBA

EIN

Year End

Address

City

State

Zip Code

Principal Business Activity

Principal Product or Service

SHAREHOLDER OWNERSHIP INFORMATION

Please provide detailed information about each shareholder in the entity for the tax year. For every shareholder, please provide their Full Name, Tax Identification Number (TIN) or Social Security Number (SSN), current Address, and their Ownership Percentage in the entity.

Full Name	TIN/SSN	Address	Own %

S CORPORATION SPECIFIC QUESTIONS

Please answer each of the following questions to the best of your knowledge.

Was the primary purpose of the S corporation activity to realize a profit?	<input type="radio"/> Yes	<input type="radio"/> No
Did the corporation hold an annual meeting with shareholders with a record of minutes maintained?	<input type="radio"/> Yes	<input type="radio"/> No
Was the corporation a C corporation before it elected to be an S corporation?	<input type="radio"/> Yes	<input type="radio"/> No
Is any shareholder in the corporation a disregarded entity, a partnership, a trust, an S corporation, or an estate?	<input type="radio"/> Yes	<input type="radio"/> No
Did the corporation own directly 20% or more, or own, directly or indirectly, 50% or more of the total stock issued and outstanding of any foreign or domestic corporation?	<input type="radio"/> Yes	<input type="radio"/> No
Did the corporation own directly an interest of 20% or more, or own, directly or indirectly, an interest of 50% or more in the profit, loss, or capital in any foreign or domestic partnership or in the beneficial interest of a trust?	<input type="radio"/> Yes	<input type="radio"/> No
Did the corporation have any outstanding shares of restricted stock at the end of the tax year?	<input type="radio"/> Yes	<input type="radio"/> No
Did the corporation have any outstanding stock options, warrants, or similar instruments at the end of the tax year?	<input type="radio"/> Yes	<input type="radio"/> No
Did the corporation have any non-shareholder debt that was cancelled, forgiven, or had terms modified to reduce amount of principal?	<input type="radio"/> Yes	<input type="radio"/> No
Was the corporation's S election terminated or revoked during the year?	<input type="radio"/> Yes	<input type="radio"/> No
At any time during the year, did the corporation have an interest in, or signature authority over a financial account in a foreign country?	<input type="radio"/> Yes	<input type="radio"/> No
Was there a distribution of property or a transfer (by sale or death) of a shareholder interest during the tax year?	<input type="radio"/> Yes	<input type="radio"/> No
Did the corporation pay \$600 or more of nonemployee compensation to any individual?	<input type="radio"/> Yes	<input type="radio"/> No
If Yes, did you issue Form 1099-NEC?	<input type="radio"/> Yes	<input type="radio"/> No
At any time during this tax year, did the corporation (a) receive a digital asset (as a reward, award, or payment for property or services); or (b) sell, exchange, or otherwise dispose of a digital asset (or a financial interest in a digital asset)?	<input type="radio"/> Yes	<input type="radio"/> No

S CORPORATION BUSINESS CREDITS

Please answer each of the following questions to the best of your knowledge.

Did the S corporation pay expenses to make it accessible by individuals with disabilities?	<input type="radio"/> Yes	<input type="radio"/> No
Did the S corporation pay any FICA on employee wages for tips above minimum wage?	<input type="radio"/> Yes	<input type="radio"/> No
Did the S corporation own any residential rental buildings providing qualified low-income housing?	<input type="radio"/> Yes	<input type="radio"/> No
Did the S corporation incur any research and experimental expenditures during the tax year?	<input type="radio"/> Yes	<input type="radio"/> No
Did the S corporation have employer pension plan start-up costs?	<input type="radio"/> Yes	<input type="radio"/> No
Did the S corporation pay health insurance premiums for employees?	<input type="radio"/> Yes	<input type="radio"/> No
Did the S corporation purchase and place in service any electric vehicles or energy efficient commercial building property?	<input type="radio"/> Yes	<input type="radio"/> No