

1120S TAX RETURN ORGANIZER

(FOR INTERNAL USE ONLY BY THE BRUNTON, STRACHAN & KHAN CPA FIRM, CHARTERED)

TAX YEAR ENDED: Month _____ Year _____ CURRENT DATE _____

TO AVOID DELAY WITH YOUR RETURN PLEASE ANSWER ALL QUESTIONS AND PROVIDE COPIES OF ALL DOCUMENTS REQUESTED

1. Name of corporation _____ Telephones: Home _____ Office _____

2. Address _____ Cell _____ Fax _____

_____ Email _____

3. U.S. Taxpayer Identification Number (Employer Identification Number) _____

4. Nature of the business _____

5. State of incorporation _____ Date of incorporation _____

Effective date of S Election _____ Effective date of S Election termination or revocation _____

6. Name and address of individual to whom return is to be sent _____

7. Name and address of individual to whom you would like an additional copy of the return to be sent _____

8. Has the corporation ever filed a U.S. tax return? Yes / No _____. Please attach a copy unless it was prepared by us.

9. Did the corporation have any transactions with related parties? Yes / No _____

If "Yes", please describe on a separate sheet. (Examples include rent paid between the U.S. activity and a shareholder or family member of a shareholder, loans, or interest or fees accrued or paid between the U.S. activity and a shareholder or family member of a shareholder, and business transactions with a shareholder or family member of a shareholder. These are only a few examples.)

10. Have financial statements been prepared for the corporation for the current tax year? Yes / No _____

If "Yes", please attach a copy. Yes / No _____

If "No", has a "trial balance" been prepared for the corporation? Yes / No _____

If you are not intending to have either financial statements or a "trial balance" prepared please provide us with the details of all the corporation's transactions for the tax year.

11. At any time during the year, did the corporation own, or have signing authority, over a bank account, securities account or other financial account outside the United States? Yes / No _____

If "Yes", please complete the "FBAR and Form 8938 organizer". A potential penalty of \$10,000 may apply for non-disclosure.

12. During the year, did the corporation own: Yes / No _____

a) Any entity that was a "disregarded entity"? Yes / No _____

b) At least 10% directly or indirectly in any foreign partnership? Yes / No _____

c) At least 10% directly or indirectly in any foreign corporation? Yes / No _____

If "Yes", please provide details.

13. At the end of the year, did the corporation itself own directly 20% or more of: Yes / No _____

a) The voting power of any foreign or domestic corporation? Yes / No _____

b) An interest in any foreign or domestic partnership? Yes / No _____

c) An interest in any foreign or domestic trust? Yes / No _____

d) An interest in any disregarded entity? Yes / No _____

If "Yes", please provide details.

14. At the end of the year, did the corporation itself own directly or indirectly 50% or more of: Yes / No _____

a) The voting power of any foreign or domestic corporation? Yes / No _____

b) An interest in any foreign or domestic partnership? Yes / No _____

c) An interest in any foreign or domestic trust? Yes / No _____

d) An interest in any disregarded entity? Yes / No _____

If "Yes", please provide details.

Please complete reverse side also



15. At the end of the year, Did any individual (or corporation, partnership, trust or association) own directly or indirectly 50% or more of the corporation's voting stock or equity? Yes / No _____
If "Yes", please list: Name _____ % owned _____
16. Please list the name, address, and U.S. Tax ID of all shareholders. Describe the terms of each class of shares that have been issued. List the number of shares of each class of shares owned by each shareholder. Describe the relationship between all shareholders. Please list all of the above for any corporate shareholder(s).
17. Did the corporation exist before the S election was made? Yes / No _____
If "Yes", please provide details.
18. Please attach copies of any of the following that were not previously provided to us:
a) Articles of Incorporation of the corporation,
b) Any mortgage documents, and
c) Deed and settlement statement (HUD-1) or closing disclosure from the purchase of all real estate owned by the corporation?
19. In/from what states does the corporation operate or earn/receive income? _____
20. What is the nature of its operations in each state? _____
21. Does the corporation have a Registered Agent in the state(s) where it transacts business, as required by law? Yes / No _____
22. Is the corporation required to register to transact business in any state,
a) because of its own activities? Yes / No _____
b) because of activities of any of its partnership interests? Yes / No _____
If "Yes", has the corporation obtained authorization(s) to transact business in the state(s)? Yes / No _____
23. Has the corporation filed all required State Corporate Annual Reports? Yes / No _____
- U.S. INCOME EARNED**
24. Did the corporation conduct business in, or earn or receive any income outside the United States? Yes / No _____
If "Yes", please attach a statement describing the nature and location(s) of the business and activity, listing the income and expenses for the year, assets purchased, and information about any office premises, and the employees and/or contractors who performed the work.
25. Did the corporation earn or receive business income from the United States during the year? Yes / No _____
If "Yes", please attach a statement describing the nature of the business, the income and expenses for the year, assets purchased and information about U.S. office premises and U.S. agents.
26. Did the corporation earn or receive any rental income from real estate? Yes / No _____
Did the corporation sell any real estate during the year? Yes / No _____
If "Yes" to either question, please call our office to request the appropriate real estate organizer.
27. Did the corporation earn or receive any other income from U.S. sources? Yes / No _____
If "Yes", please describe, including payor and amount. _____
- OTHER**
28. During the calendar year did the corporation pay U.S. expenses aggregating US \$600 or more to any individual, unincorporated business, or attorney? Yes / No _____
If "Yes", please provide details _____
If "Yes", did the corporation file Form 1099-Misc for the above U.S. expenses? Yes / No _____
29. Provide details and amounts of any taxes withheld or paid in the U.S. during the year. Also provide details of charitable contributions, and casualty or theft losses in the U.S.
30. Do you have intentions of closing the corporation in the near future? Yes / No _____
If "Yes", please contact our office.
31. **Have you answered all questions & supplied all documents requested on this questionnaire?** Yes / No _____
If "No", please explain, otherwise your tax return may be delayed and/or the fee may be increased because of the extra time required. _____

Signature _____

PLEASE RETURN TO: THE BRUNTON, STRACHAN & KHAN CPA FIRM, CHARTERED, 4710 NW BOCA RATON BLVD., #101, BOCA RATON, FL 33431
Tel (561) 241-9991 Fax (561) 241-6332 Email: tax@taxintl.com Website: www.taxintl.com

Please include a US \$1,000 retainer payable to "The Brunton, Strachan & Khan CPA Firm" with this organizer.

If you wish, retainers can be paid online with a credit card. Please go to our website www.taxintl.com and scroll down to "Make Payment" on the lower right side or call our office to make a credit card payment over the phone.