

## Auto Expense

Corporation Name: \_\_\_\_\_

EIN: \_\_\_\_\_

### Auto Expense

Name of activity vehicle is used for \_\_\_\_\_

Description of vehicle \_\_\_\_\_

Date vehicle was placed in service \_\_\_\_\_

Yes No

- Was this vehicle available for personal use during off-duty hours?
- Was the vehicle used primarily by someone with more than 5% ownership or a related person?
- Was another vehicle available for personal use?

Number of miles the vehicle was driven during 2024	2024	2023	Total number of miles the vehicle was driven in prior years	2024	2023
Business . . . . .	_____	_____	Business . . . . .	_____	_____
Commuting . . . . .	_____	_____	Total . . . . .	_____	_____
Other . . . . .	_____	_____			

### Expenses

Garage rent . . . . .	_____	_____	Repairs . . . . .	_____	_____
Gas . . . . .	_____	_____	Tires . . . . .	_____	_____
Insurance . . . . .	_____	_____	Tolls . . . . .	_____	_____
Licenses . . . . .	_____	_____	Lease addback . . . . .	_____	_____
Oil . . . . .	_____	_____	Other expenses		_____
Parking fees . . . . .	_____	_____	_____	_____	_____
Rental fees . . . . .	_____	_____	_____	_____	_____
Interest . . . . .	_____	_____	_____	_____	_____
Property tax . . . . .	_____	_____			





## 2024 Tax Organizer for Corporations Business Information

### Business Information

<b>Corporation's legal name</b>		<b>EIN</b>	
<b>Doing business as name</b>			
<b>In care of name</b>			
<b>Street address, city, state, and ZIP</b>			
<b>Email</b>			
<b>Phone number</b>		<b>Date of S corporation election</b>	
<b>Cell number</b>		<b>Date incorporated</b>	
<b>Fax number</b>		<b>State of incorporation</b>	

**Yes**   **No**

Does the corporation file under a calendar year?  
 If "No," what is the tax year begin date? \_\_\_\_\_ Tax year end date? \_\_\_\_\_

Is this the corporations final year?

Did the corporation conduct business activities in any state other than the resident state?  
 If "Yes," what states? \_\_\_\_\_

What is the corporation's main business activity? \_\_\_\_\_

What product or service does the corporation provide? \_\_\_\_\_

What accounting method does the corporation use?  
 Cash    Accrual   Other (describe) \_\_\_\_\_

How many shareholders did the corporation have during the year? \_\_\_\_\_

### Estimates

	Federal		Resident State		Resident City	
	Date Paid	Amount	Date Paid	Amount	Date Paid	Amount
Overpayment applied from 2023	_____	_____	_____	_____	_____	_____
First quarter	_____	_____	_____	_____	_____	_____
Second quarter	_____	_____	_____	_____	_____	_____
Third quarter	_____	_____	_____	_____	_____	_____
Fourth quarter	_____	_____	_____	_____	_____	_____
Additional payments	_____	_____	_____	_____	_____	_____

### Account Information for Deposits and Withdrawals

Name of Bank	Bank Routing Number	Bank Account Number	Type of Account		Use This Account for	
			Checking	Savings	Deposits	Withdrawals



### Shareholder and Officer Information

Corporation Name:

EIN:

Shareholder or Officer Name Address City, State, and ZIP	ID Number	Title	Shares at Start of Year	Percentage of Ownership and Participation				Officer Compensation
				Total	Common	Preferred	Time	



## Rental Real Estate

Corporation Name: \_\_\_\_\_

EIN: \_\_\_\_\_

### General Property Information

**Select the property type**

- Single family residence
- Multi-family residence
- Vacation
- Commercial
- Land
- Royalties
- Self-rental
- Other

Description of property if the property type is "Other" \_\_\_\_\_

Address of property \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

Foreign province \_\_\_\_\_ Country \_\_\_\_\_ Postal code \_\_\_\_\_

Number of days property was rented \_\_\_\_\_ Number of days property was used for personal use \_\_\_\_\_

- This property was placed in service during tax year 2024.
- This property was disposed of during tax year 2024.

### Income and Expenses

	2024	2023
Gross rental or royalty income . . . . .	_____	_____
Advertising . . . . .	_____	_____
Auto and travel . . . . .	_____	_____
Cleaning and maintenance . . . . .	_____	_____
Commissions . . . . .	_____	_____
Insurance . . . . .	_____	_____
Legal and other professional fees . . . . .	_____	_____
Interest . . . . .	_____	_____
Repairs . . . . .	_____	_____
Taxes . . . . .	_____	_____
Utilities . . . . .	_____	_____
Wages and salaries . . . . .	_____	_____
Meals and entertainment . . . . .	_____	_____
Other expenses (list) . . . . .	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____



### Rental Other Than Real Estate

Corporation Name: \_\_\_\_\_

EIN: \_\_\_\_\_

#### General Property Information

Description of property \_\_\_\_\_

Address of property \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

- This property was placed in service during tax year 2024.
- This property was disposed of during tax year 2024.

#### Income and Expenses

	2024	2023
Gross rental income . . . . .	_____	_____
Advertising . . . . .	_____	_____
Auto and travel . . . . .	_____	_____
Cleaning and maintenance . . . . .	_____	_____
Commissions . . . . .	_____	_____
Insurance . . . . .	_____	_____
Legal and other professional fees . . . . .	_____	_____
Interest . . . . .	_____	_____
Repairs . . . . .	_____	_____
Taxes . . . . .	_____	_____
Utilities . . . . .	_____	_____
Wages and salaries . . . . .	_____	_____
Other expenses (list)		
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Sale of Stock, Real Estate, or Other Property

Corporation Name:

EIN:

Sale of Capital Assets (including items not reported on Form 1099-B)

Provide all brokerage statements

Table with 5 columns: Description of Property, Date Purchased, Date Sold, Sales Price, Cost. Multiple rows for data entry.

Installment Sale Income

Description of property: \_\_\_\_\_

Date acquired \_\_\_\_\_ Date sold \_\_\_\_\_

Table with 3 columns: 2024, Prior Years, and a column for description of income items like Selling price, Mortgages assumed, etc.

Property was sold to a related party