

Paper Business Return Organizer (1120, 1120S, and 1065)

Business name:

Name of Person Completing Organizer:

Did you electronically sign your Business Tax Return Engagement Letter?

YES

NO

Provide an explanation of significant changes to your business (if any).

If your business address changed since last years return was filed; provide new address below.

If there was a change in ownership: Provide the new owner's name, social security number, mailing address, change in ownership percentage, and the date of change.

Did you file the BOI report with FinCEN for your business?

YES

NO

As of January 2025, due to the federal court order reporting companies are NOT currently required to file the BOI report with FinCen and are NOT subject to liability if they fail to do so while the court order remains in force. However, reporting companies may continue to voluntarily submit their BOI reports.

If your business sold or exchange any property or assets: Provide a description of asset sold or exchanged, the date it was sold, and the amount it was sold for.

Did your business receive or sell, exchange, gift or otherwise dispose of a digital asset or a financial interest in a digital asset?

YES

NO

If your business restructured current debt or took on any new debts during the year, provide an explanation of any new or restructured debt your business had during the year.

Did your business receive any correspondence from the IRS or other taxing authority during the year? If yes, please provide us with a copy.

YES

NO

Did you MAKE any payments that would require you to file Form(s) 1099?

YES

NO

Did your business RECEIVE any Form 1099(s) for non-employee compensation (1099-NEC), interest (1099-INT), dividends (1099-DIV), reportable payment transactions made through a payment card or third-party payment network (1099-K), or miscellaneous income (1099-MISC)? Please provide us with copies.

YES

NO

Did your business make any payments to foreign persons that would require filing an annual withholding tax return (Forms 1042 and 1042-S)?

YES

NO

If your business conducted services or provided goods outside of your home state, provide an explanation of the services your business provided or goods you sold outside of your home state.

If your business employed anyone outside of your home state, list the state(s) in which you had employee(s) located outside of your home state.

If your business made any estimated tax payments (including NC PTE payments) for this tax year, provide **amount paid** and **date paid** below:

EST Payment #1	EST Payment #2
EST Payment #3	EST Payment #4

Did you file the annual report with the North Carolina Secretary of State?	YES	NO
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Every North Carolina corporation, LLC, and partnership (LLP and LLLP) must file an annual report with the North Carolina Secretary of State each year. Entities that are organized as a PLLC or PA are not required to file.

Do you have any other comments or questions that will help us better prepare your returns?

Please provide any tax return documents or other supporting documentation needed for the preparation of your BUSINESS tax returns.

Is the information you have provided to us for your tax return complete and accurate to the best of your knowledge?	YES	NO
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