TAX ORGANIZER –
BUSINESS ENTITIES

YOUR TAX APPOINTMENT

Please complete and sign this organizer prior to your appointment.

Please call to schedule your appointment. It is best to call early before the calendar becomes full.

Please mail the completed organizer along with the requested information to our offices prior to February 5, 2016.

Indicate Desired Appointment Date

Date: ______________________________________

Time: ______________________________________

Please notify this office promptly if you are unable to keep this appointment.

Referrals are Always
Appreciated.

If you know someone who would like a tax appointment, please have them call this office. Do not be concerned that your business, personal or financial matters will be discussed with clients whom you refer. All client information is treated in the utmost confidence.

A1 - ENTITY INFORMATION

Returning entities enter name of business and skip entries except for changes.

Name of Business -		Employer ID Number (EIN)	
Address			
Contact Individual		Phone	
E-mail			

Check One: X Corporation | S-Corporation | General Partnership | Limited Partnership | Limited Liability Company | Limited Liability Partnership

Principal Business Activity		Date Business Started	
Principal Product or Service		Business Code	

Method of Accounting (Check One) X Cash | Accrual | Other (Describe):

A2 – Please sign that enclosed information is true & correct-Signature Required

All information is true and correct to the best of my knowledge

DECLARATION :
I have provided the information requested, where applicable, by this form to the best of my knowledge and hereby declare it is complete and ready for the preparation of my/our income tax returns. Where business deductions shown, I acknowledge having spent these amounts and have kept a log or diary of such activities, pursuant to section 274(a) and can fully substantiate such deductions.

Signature ________________________ Date ____________

Boyer & Boyer, Certified Public Accountants
boyercpa@comcast.net

2392 Limestone Road
Wilmington, Delaware 19808
(302) 998-3700

2496 North DuPont Parkway
Middletown, Delaware 19709
(302) 464-1300

Dear Client:

Your calendar year corporate tax return is due March 15, 2016. So you can meet this deadline we will need the following information in our offices no later than February 05, 2016:

- Complete bank statements for ALL accounts for the entire year.
- All credit card/loan statements for the entire year.
- Computer program backup media or Safeguard sheets or check stubs, depending on your method of bookkeeping. You may also upload your digital accounting records to SHAREFILE. Our Accountants will send you an invitation via email to securely upload a backup file into our Cloud Portal. Scanned documents, such as bank and credit card statements can also be uploaded into Sharefile. Please contact our firm with any questions.
- Breakdown of deposits that are non-income based.
- List of all assets acquired or disposed of during the year.
- Copies of all sales contracts and loan agreements for the year.
- Accurate balances of Accounts Receivable, Inventory and Accounts Payable as of 12/31 if applicable.
- Copies of the declarations sheet for all insurance policies for the year.
- All payroll information and reports if not prepared by our firm.
- Statements on all investments for the year.
- Year-end loan statements.

Should you have any questions in preparing this information, please contact the business entity department.

Sincerely,

Elizabeth L. Boyer, CPA

Boyer & Boyer, Certified Public Accountants
boyercpa@comcast.net

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