

2023 Corporation Tax Checklist

- Provide us your corporation information
 - Name of Corporation:
 - Corporation Address:
 - Occupation:
 - States your corporation worked in:
 - States your corporation is registered in:
- Ownership of Corporation
 - Provide a list of the name, address, and ownership percentage of each shareholder
- Sign and send us your Engagement Letter.
- Sign Notice Protection Letter
- Prepare and send us your Income and Expenses and choose one of these options:
 - QuickBooks Online
 - Make sure all transactions have been added from 1/1/2023 to 12/31/2023.
 - Make sure you have reconciled your bank accounts and credit card accounts.
 - Add us as your accountant by using info@emtaxservice.com *do not add if already added in a previous year
 - Send us an Excel Spreadsheet (if using numbers, please convert to excel)
 - This can be our spreadsheet or one that you have created. It must include:
 - Totals of income and expenses
 - Business bank account balances (Checking/Savings) ending at 12/31/2023
 - Business credit card and other loans (EIDL/Auto) ending balances at 12/31/2023
 - Total distributions (amounts you paid yourself not including payroll)
 - Send us an email detailing out total income and total expenses by category. Must include Totals of Income and Expenses, Bank, Credit Card and Loan balances as of 12/31/2023.
- Standard questions:
 - Did you contribute to a SEP IRA, Solo401(k), or DBPP?
 - If so, how much _____
 - Account type _____
 - Are you interested in contributing to a retirement account if you have not already done so? YES or NO
 - Did you make any PTEC payments in 2023?
 - Payment #1 amount and date paid _____
 - Payment #2 amount and date paid _____
 - City of Los Angeles Business Tax Renewal Due February 29th. (if located within Los Angeles)
 - Sign engagement letter for E&M to prepare OR file @ finance.lacity.gov
 - CA or other state estimated taxes, include other state or country withholdings
 - List amount and date paid _____
 - NOTES – Please share any changes that may affect your tax return