



BUSINESS TAX ORGANIZER

TAX YEAR ENDING

1 START HERE

Complete the parts that apply. If you are unsure, check Not sure or add a brief note.

Protect business information

Upload this organizer and supporting records through the secure client portal. Do not email tax documents, bank information, Social Security numbers, or portal passwords.

Business identity

LEGAL BUSINESS NAME

EIN

DBA / TRADE NAME

PRIMARY BUSINESS ACTIVITY

BUSINESS ADDRESS

CITY

STATE

ZIP

FISCAL YEAR-END, IF NOT 12/31

ENTITY TYPE

☐ Partnership / multi-member LLC☐ S corporation☐ C corporation☐ Other / unsure

AUTHORIZED SIGNER

TITLE

PHONE

BEST EMAIL

2 PRIOR-YEAR RETURN AND FILING STATUS

☐ Complete prior-year federal, state, and local business returns are on file with Clear Course☐ Uploaded the complete prior-year returns with this organizer☐ Will upload the prior-year returns separately☐ First business return - no prior return☐ Continuing business☐ Initial return☐ Final return / closed☐ Amended return



3 WHAT CHANGED DURING THE YEAR?

Check Yes, No, or Not sure. Use the details box when a Yes answer needs explanation.

Did the business name, address, entity type, or tax election change?	☐ Yes	☐ No	☐ Not sure
Did any owner join, leave, sell, transfer, redeem, or change ownership?	☐ Yes	☐ No	☐ Not sure
Did the business start, close, merge, reorganize, buy another business, or sell part of the business?	☐ Yes	☐ No	☐ Not sure
Did the business begin operating, hiring, owning property, or making sales in a new state or locality?	☐ Yes	☐ No	☐ Not sure
Did the business receive an IRS, state, or local tax notice?	☐ Yes	☐ No	☐ Not sure
Did the accounting method, inventory method, or way the books are maintained change?	☐ Yes	☐ No	☐ Not sure
Did the business begin or end transactions with an owner, family member, or related business?	☐ Yes	☐ No	☐ Not sure
Was there any unusual event that could affect the return?	☐ Yes	☐ No	☐ Not sure

DESCRIBE ANY YES ANSWERS OR OTHER IMPORTANT CHANGES



4 BOOKS, INCOME, AND EXPENSES

Bookkeeping

WHO MAINTAINS THE BOOKS?

☐ Clear Course ☐ Internal staff ☐ Outside bookkeeper ☐ Owner ☐ Other

ACCOUNTING SOFTWARE**BOOKS COMPLETE THROUGH****ACCOUNTS RECONCILED THROUGH**

☐ Year-end books are final ☐ Preliminary ☐ Cleanup or adjustments may be needed

ANYTHING WE SHOULD KNOW ABOUT THE BOOKS?

Income

Did the business receive Forms 1099 or Schedule K-1 income? ☐ Yes ☐ No ☐ Not sure

Did the business receive grants, loan forgiveness, refunds, insurance proceeds, or other nonroutine income? ☐ Yes ☐ No ☐ Not sure

GROSS RECEIPTS PER BOOKS**OTHER INCOME PER BOOKS****INCOME NOTES**

Expenses

Were any personal expenses paid from business accounts? ☐ Yes ☐ No ☐ Not sure

Were any business expenses paid personally by an owner? ☐ Yes ☐ No ☐ Not sure

Are meals, entertainment, fines, penalties, charitable gifts, and political costs separately identified in the books? ☐ Yes ☐ No ☐ Not sure

EXPLANATION OR EXPENSE QUESTIONS



5 PAYROLL, CONTRACTORS, AND OWNER BENEFITS

Employees and payroll

Did the business have employees during the year? ☐ Yes ☐ No ☐ Not sure

Did the business pay corporate officers or owner-employees through payroll? ☐ Yes ☐ No ☐ Not sure

Were all payroll returns and Forms W-2 filed? ☐ Yes ☐ No ☐ Not sure

Were any payroll deposits or payroll filings late? ☐ Yes ☐ No ☐ Not sure

Did any employee work in a new state or locality, including remotely? ☐ Yes ☐ No ☐ Not sure

PAYROLL PROVIDER

TOTAL WAGES

OFFICER / OWNER WAGES

Contractors and vendors

Did the business pay contractors or other vendors who may need a Form 1099? ☐ Yes ☐ No ☐ Not sure

Were all required Forms 1099 filed? ☐ Yes ☐ No ☐ Not sure

Did the business pay any vendor or contractor outside the United States? ☐ Yes ☐ No ☐ Not sure

CONTRACTOR OR FORM 1099 NOTES

Owner benefits

Check any benefits the business paid for an owner, partner, shareholder, or owner-employee.

☐ Health insurance ☐ Retirement ☐ Vehicle ☐ Life insurance ☐ Other

BENEFIT DETAILS, INCLUDING OWNER NAME AND AMOUNT



6 OWNERS AND OWNER TRANSACTIONS

List each owner, partner, or shareholder. Upload a separate owner schedule if more space is needed.

OWNER 1**LEGAL NAME****OWNER TYPE / ROLE****OWNERSHIP %****DATES OWNED****CONTRIBUTIONS****DISTRIBUTIONS****TITLE / NOTES****OWNER 2****LEGAL NAME****OWNER TYPE / ROLE****OWNERSHIP %****DATES OWNED****CONTRIBUTIONS****DISTRIBUTIONS****TITLE / NOTES****OWNER 3****LEGAL NAME****OWNER TYPE / ROLE****OWNERSHIP %****DATES OWNED****CONTRIBUTIONS****DISTRIBUTIONS****TITLE / NOTES****OWNER 4****LEGAL NAME****OWNER TYPE / ROLE****OWNERSHIP %****DATES OWNED****CONTRIBUTIONS****DISTRIBUTIONS****TITLE / NOTES**☐ More than four owners - separate schedule uploaded☐ Owner tax IDs are securely on file and unchanged**OWNERSHIP CHANGE OR SPECIAL ALLOCATION DETAILS**



☐ Yes ☐ No ☐ Not sure

☐ Yes ☐ No ☐ Not sure



9 ASSETS AND SPECIAL ACTIVITY DETAILS

ASSETS / IMPROVEMENTS - DESCRIPTION, DATE, COST, AND BUSINESS USE

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VEHICLES - OWNER, DATE ACQUIRED/SOLD, BUSINESS MILES, TOTAL MILES, AND COSTS

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BEGINNING INVENTORY

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PURCHASES / PRODUCTION COST

--

ENDING INVENTORY

--

LOANS - LENDER, PURPOSE, BEGINNING BALANCE, NEW BORROWING, PAYMENTS, AND ENDING BALANCE

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10 STATE, LOCAL, FOREIGN, AND OTHER ACTIVITY

Did the business operate, hire, own property, or make sales in more than one state or locality?

☐ Yes☐ No☐ Not sure

Was the business registered for, or required to collect, sales tax?

☐ Yes☐ No☐ Not sure

Did the business have any foreign owner, account, asset, income, vendor payment, or related-party transaction?

☐ Yes☐ No☐ Not sure

Did the business buy, sell, receive, mine, stake, or otherwise transact in digital assets?

☐ Yes☐ No☐ Not sure

Did the business conduct research or develop products, software, or processes?

☐ Yes☐ No☐ Not sure

Did the business buy or sell real property?

☐ Yes☐ No☐ Not sure

Did the business have a casualty, theft, legal settlement, insurance recovery, grant, or other unusual event?

☐ Yes☐ No☐ Not sure

DETAILS FOR ANY YES ANSWER

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Do not include owners' personal estimated-tax payments here. Report those in the Personal Tax Organizer.

☐ Not sure

Optional. Provide only through the secure portal. We will confirm the account before using it on a return or payment authorization.

 Savings

☐ Discuss first
