BYRD & MASSEY
Certified Public Accountant

New C-Corporation Tax Client – Setup Checklist

- ☐ Legal business name & DBA (if applicable)
- ☐ Business start date
- ☐ State(s) of formation and operation
- ☐ Business address (physical and mailing)
- ☐ Estimated Tax Payments
- ☐ Dividends Paid
- ☐ Accounting software used

Required Documents

- ☐ IRS SS-4 / EIN confirmation letter
- ☐ Articles of incorporation / organization
- ☐ Prior-year federal and state tax returns
- ☐ Current year Profit & Loss statement and Balance Sheet
- ☐ Quarterly payroll reports (Forms 941) / Annual payroll report (W-3) / State payroll filings
- ☐ IRS S-Corporation election confirmation (Form 2553 approval letter)

Client Acknowledgement

- ☐ *I understand that incomplete or delayed information may delay tax preparation.*
- ☐ *I confirm the information provided is accurate to the best of my knowledge.*

Client Name: _____

Date: _____