

LLC Tax Organizer

Use a separate organizer for each LLC

LLC General Information

Legal name of LLC		EIN	-
LLC address <input type="checkbox"/> (check if new address)			
LLC Representative		Title	
		Email	Phone ()
Principal business activity			
Principal product or service			
<input type="checkbox"/> Yes <input type="checkbox"/> No	Was the primary purpose of the LLC activity to realize a profit?		
<input type="checkbox"/> Yes <input type="checkbox"/> No	Has the business reported any losses in prior years? If yes, provide details.		
Accounting method: <input type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify)			
<input type="checkbox"/> Yes <input type="checkbox"/> No	Does the LLC file under a calendar year? (If no, what is the fiscal year?)		
<input type="checkbox"/> Yes <input type="checkbox"/> No	Has the LLC made the election to be taxed as a corporation?		
If the LLC is an S corporation, provide a copy of Form 2553, <i>Election by a Small Business Corporation</i> , and the acceptance letter from the IRS.			

LLC Specific Questions

<input type="checkbox"/> Yes <input type="checkbox"/> No	Does the LLC have an operating agreement? (If this is the first year of the LLC's existence, please provide a copy of the Operating Agreement and the Articles of Organization)
<input type="checkbox"/> Yes <input type="checkbox"/> No	Are all members actively participating in the business?
<input type="checkbox"/> Yes <input type="checkbox"/> No	Is any member in the LLC a disregarded entity, partnership, trust, S corporation, or estate?
<input type="checkbox"/> Yes <input type="checkbox"/> No	Is the LLC a partner in another partnership?
<input type="checkbox"/> Yes <input type="checkbox"/> No	Did any foreign or domestic corporation, partnership, trust, tax-exempt organization, individual, or estate own directly or indirectly 50% or more of the profit, loss, or capital of the LLC?
<input type="checkbox"/> Yes <input type="checkbox"/> No	Did the LLC own directly 20% or more, or own, directly or indirectly, 50% or more of the total voting power of all classes of stock entitled to vote of any foreign or domestic corporation?
<input type="checkbox"/> Yes <input type="checkbox"/> No	Did the LLC have any debt that was cancelled, was forgiven, or had the terms modified so as to reduce principal amount of debt?
<input type="checkbox"/> Yes <input type="checkbox"/> No	At any time during the year did the LLC have an interest in, or signature authority over, a financial account in a foreign country?
<input type="checkbox"/> Yes <input type="checkbox"/> No	Was there a distribution of property or a transfer (by sale or death) of an LLC interest during the tax year?
<input type="checkbox"/> Yes <input type="checkbox"/> No	Did the LLC pay \$600 or more to any individual? If yes, include a copy of Form 1099-NEC for each.
<input type="checkbox"/> Yes <input type="checkbox"/> No	Did the LLC have a Paycheck Protection Program (PPP) loan that was forgiven in 2025?

Principal Members Ownership Information

Name	Tax ID number (SSN or EIN)	Address	Ownership percentage	Member or member-manager	U.S. citizen?

LLC Other Transactions

Member name	Guaranteed payments	Health insurance premiums paid	Capital contributions from member	Distributions to member	Member loans to the LLC	Loans repaid by LLC to member

All Clients – Additional information and documents required

- Provide the income/financial statements for the year (per books), balance sheet, depreciation schedule per books, and cash reconciliation of business bank accounts with ending cash balance.
- If the LLC has employees or paid independent contractors, provide a copy of all Forms W-2, W-3, 940, 941, 1096, 1099-NEC, 1099-MISC, any state tax filing reports, and any other forms issued to workers.
- If any members live in a different state or outside the U.S., provide details. The business may be subject to withholding requirements.

New Clients – Additional information and documents required

- Date LLC formed
- State LLC formed in
- Provide copies of LLC's Articles of Organization and Operating Agreement (if any).
- Provide copies of depreciation schedules for book, tax, and AMT.
- Provide copies of tax returns for last two years, including state returns (if applicable).