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CORPORATION & PARTNERSHIP CHECKLIST

C-Corporation returns are due Mon, April 17th, 2023 and we must have your tax information before April 1st.

S-Corporation and Partnership tax returns are due to the IRS, Wed, March 15, 2023. Please drop off all your tax information to us before March 1st (unless you have a scheduled appointment) or contact us to file an extension. **We will NOT automatically file an extension for you.**

S-Corporation and Partnership tax returns must be completed prior to your personal return. This includes LLC's taxed as an S-Corporation or Partnership. In an attempt to prevent incomplete appointments, we will notify you when your corporation taxes are completed and then schedule an appointment for your personal tax return. Blocks of time are reserved for your personal tax appointments to prevent additional time delays.

Checklist of items to bring: If you are a current bookkeeping client, we should already have the items marked with an asterisk (**): If you are a current payroll client, we should have these items (***).

- Any COVID related payroll credits (If yes, please provide copies of Amended 941 Quarterly forms) ***
- Loan and credit card balances & interest paid on those loans and credit cards.
- Copies of W-2's and W-3 for your employees (***)
- Personal money put in or taken out (draws or loans, not payroll) **
- Shareholder information (name, social security number, address, and # of shares or % of ownership)
- Balance in all checking, credit cards, savings and investment accounts as of 12/31/2022 **
- Corporation Income **
- Corporation expenses totaled & listed by category (i.e., advertising, supplies, etc.) **
- Equipment purchased over \$500 (date of purchase, cost, and description) **
- Equipment disposed of or no longer in service that was depreciated on prior returns (see prior year tax return for complete Depreciation Asset listing).
- Signed corporation engagement letter (on reverse side)
- Health insurance premiums paid for or reimbursed to stockholders and employees (listed separately).

2022 Partnership/Corporation Business Engagement Letter

Thank you for choosing Norma's Tax Service to assist you with your 2022 taxes. This letter confirms the terms of our engagement with you and outlines the nature and extent of the services we will provide.

We will prepare your 2022 federal and state business tax return to include Corporation, S-Corporation and Partnership income. This engagement does not cover the preparation of financial statements. We will depend on you to provide the financial statements and other information we need to prepare complete and accurate returns. We may ask you to clarify some items but will not audit or otherwise verify the data you submit. However, the amounts provided must be verifiable upon request as required by law. You are responsible for the safeguarding of assets, the proper recording of transactions in the books of accounts, the substantial accuracy of the financial records, and the full and accurate disclosure of all relevant facts affecting the return(s) to us. You also have the final responsibility for the tax return and therefore the appropriate officials should review the return carefully before an authorized officer signs and files it.

This engagement is for business entity tax preparation only and does not include any accounting services. Accounting services will be performed for additional fees as mutually agreed upon. Our work in preparation of the tax return(s) does not include procedures designed to find defalcations or other irregularities should any exist. The returns will be prepared solely from information provided to us without verification by us. Accordingly, our engagement should not be relied upon to disclose errors, fraud, or other illegal acts, though it may be necessary for you to clarify some of the information you submit. We will, of course, as required by law, inform you of any material errors, fraud, or other illegal acts we discover.

The law imposes penalties when taxpayers underestimate tax liability. Please call us if you have concerns about such penalties or if you receive any correspondence from the IRS.

Should we encounter instances of unclear tax law, or of potential conflicts in the interpretation of the law, we will outline the reasonable courses of action and the risks and consequences of each. We will ultimately adopt, on your behalf, the alternative you select.

Our fee will be based on the time required at standard billing rates plus out-of-pocket expenses. Invoices are due and payable upon presentation. Tax returns will not be released or e-filed until payment and all necessary signatures have been received.

We will return your original records to you at the end of this engagement. You should securely store these records, along with all supporting documents, canceled checks, etc., as these items may later be needed to prove accuracy and completeness of a return. Digital copies of your records and our work papers will be retained securely off site for five years, after which these documents will be destroyed.

This office does not do any elections except upon request in writing. Requests must be received four weeks prior to due date.

Our engagement to prepare your 2022 business tax returns will conclude with your signing and subsequent submittal of your e-filed tax. If your return does not meet e-filing requirements, you will be solely responsible to file the returns and any additional paper filing fees/penalties with the appropriate taxing authorities. Signatures verify your careful review and approval of all tax return documents.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, please sign this letter in the space indicated and return it to us. We appreciate your confidence in us and want to express our appreciation for this opportunity to work with you. Please call if you have questions.

Sincerely,

The staff of Norma's Tax Service

Partnership/Corporation Name

Date

Partner or Corporate Officer