

1120 TAX RETURN ORGANIZER (REAL ESTATE INCOME)
FOR INTERNAL USE ONLY BY THE BRUNTON – MCCARTHY CPA FIRM CHARTERED

FOR TAX YEAR ENDED: Month _____ Year _____

CURRENT DATE _____

TO AVOID DELAY WITH YOUR RETURN PLEASE ANSWER ALL QUESTIONS AND PROVIDE COPIES OF ALL DOCUMENTS REQUESTED

1. Name of Corporation _____ Telephones: Home _____ Office _____
2. Address _____ Cell _____ Fax _____
_____ Email _____
3. U.S. taxpayer identification number, if any _____
4. State of Incorporation _____ Date of Incorporation _____
5. Name and address of individual to whom return is to be sent _____

6. Name and address of individual to whom you would like an additional copy of the return to be sent _____

7. Has the company ever filed a U.S. tax return? Yes No If "Yes" please provide the latest one.
8. Did the company have any transactions with related parties? Yes No
If "Yes" please describe on a separate page. (Examples would include rent paid between the company and a shareholder or family member of a shareholder, loans or interest advanced or paid between the company and a shareholder or family member of a shareholder, and business transactions with a shareholder or family member of a shareholder. These are only a few examples).
9. Was there personal use of the company's assets? Yes No If "Yes" please describe.
No. days personal use _____ No. days rented _____ No. days vacant _____
10. Have financial statements been prepared for the company for the current tax year? Yes No
If "Yes", please attach a copy. If "No", has a "trial balance" been prepared for the company? Yes No
If you are not intending to have either financial statements or a "trial balance" prepared please provide us with the details of all the company's transactions for the tax year.
11. Did the corporation itself own directly or indirectly 50% or more of the voting stock of any U.S. corporation at year end? Yes No
12. Did any individual, (or corporation, partnership, trust or association) own directly or indirectly 50% or more of the corporation's voting stock or equity at year end? Yes No
If "Yes" please list: Name _____, % owned _____
13. Did any person or entity own directly or indirectly 25% or more of the stock or equity of the company at any time during the year? Yes No
If "Yes", please list the names, addresses and percentages of each: _____
14. How many shareholders does the corporation have? _____
15. At any time during the calendar year did the corporation have a bank account, securities account or other account outside the United States? Yes No If yes, please explain _____
Provide the Name and Address of the Institution (bank, stockbrokerage, Trust Co., Life Insurance Co., etc.), account number and maximum balance of each account.
16. Please attach any of the following that was not previously provided to us:

- a) A copy of the Articles of Incorporation of the company
- b) A copy of any mortgage documents
- c) A copy of the Deed and Settlement Statement (Statement of Adjustments) from the purchase of all real estate owned by the company

17. Did the company pay any U.S. Federal or State corporate income tax? [] Yes [] No
 If "Yes" give details including payment dates _____

18. Who is the company's U.S. (state) registered agent? _____

19. Has the company filed all required State Corporation Uniform Business Reports? [] Yes [] No

REAL ESTATE

20. For all real estate owned by the company, please provide a description of the nature of the property (i.e. home, condo, commercial bldg., etc.) _____

Property Address _____

Cost _____ Was the property purchased furnished or unfurnished? [] Furn. [] Unfurn.

If the property was purchased furnished, what is a reasonable portion of the purchase price to allocate to the value of the furnishings? _____

	Description	Date	Cost
Subsequent Improvements:	_____	_____	_____
Assessments for Improvements	_____	_____	_____
Furnishings Purchased:	_____	_____	_____

21. For each U.S. property you sold during the year, please provide:

a) Address _____

b) Date sold _____ Selling price _____ The property was sold: [] Furnished [] Unfurnished

22. Please provide amounts for all expenses paid up to the date of sale.
 Please also attach the Sales Contract and Closing Statement (Statement of Adjustments), for sale of the property.

23. Is the Corporation being dissolved? [] Yes [] No

RENTAL INCOME

24. If the company received rental income from the property was all the rental income received from tenants on a written lease exceeding six months? [] Yes [] No

25. Was State Sales Tax collected from the tenant and paid to the state? [] Yes [] No
 If yes, is the Sales Tax included in the amount for "Rental Income" listed on your financial statements? [] Yes [] No

26. Was County Tourist Development Tax collected from the tenant and paid to the County? [] Yes [] No
 If yes, is it included in the amount for "Rental Income" listed on your financial statements? [] Yes [] No

27. Was County Personal Property Tax paid on the appliances and furnishings? [] Yes [] No

28. Have you prepared or will you prepare your own 2008 County Personal Property Tax Return? [] Yes [] No
 If no, would you like us to prepare the County Personal Property Tax Return, if required? [] Yes [] No

29. Have you answered all questions & supplied all documents requested on this questionnaire? [] Yes [] No
 If "No" please explain, otherwise the return may be delayed and/or the fee may be increased because of the extra time required.

Signed _____

PLEASE RETURN TO: THE BRUNTON – MCCARTHY CPA FIRM CHARTERED, 4710 NW 2ND AVENUE, #101, BOCA RATON, FL 33431
 Tel (561) 241-9991 Fax (561) 241-6332 Email: tax@taxintl.com

Please include a US \$400 retainer with this organizer.