



Business Entity Filing Checklist

Before we can file your S Corporation or C Corporation return, please gather the following documents. This checklist ensures we prepare an accurate, IRS-compliant return with built-in strategy and support.

- ☐ Prior year's corporate tax return (if switching preparers)
- ☐ Articles of Incorporation
- ☐ EIN confirmation letter
- ☐ List of shareholders or officers with SSNs and ownership percentages
- ☐ Profit & Loss statement (year-end)
- ☐ Balance Sheet (year-end)
- ☐ Payroll reports and W-2s for officers (if applicable)
- ☐ State registration certificate (if filing state return)
- ☐ Any IRS letters or CP notices received

Need help? Contact WealthCrest Financial at support@wealthcrest-financial.com or call (972) 440-5152.

Website: www.WealthCrest-Financial.com