

S Corporation Year-End Checklist

Review payroll, owner compensation, distributions, basis inputs, loans, assets, elections, and year-end close items before the return is prepared.

FREE PDF RESOURCE	Free to view, download, print, and use internally as a general guide.
PUBLIC FORMAT	Watermarked public edition. Editing, assembly, and extraction are disabled in compliant PDF readers.
REUSABLE WORD VERSION	Available when this resource relates to a paid RiskWise engagement.

What this free resource includes

01 Payroll and compensation

02 Distributions and contributions

03 Shareholder loans

04 Basis support

05 Year-end records

Use the working pages to collect facts, owners, evidence, and dates. Review tax, legal, security, licensing, employment, insurance, or regulatory decisions with the qualified professional appropriate to your facts.

Work through S Corporation Year-End Checklist

Record what is known, identify the source, assign an owner, and make missing information visible.

Payroll and compensation

Purpose / facts / owner / evidence / date:

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Distributions and contributions

Purpose / facts / owner / evidence / date:

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Shareholder loans

Purpose / facts / owner / evidence / date:

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Finish the record and confirm the next step

Complete the remaining sections, then identify what needs review, approval, secure delivery, implementation, or follow-up.

Basis support

Purpose / facts / owner / evidence / date:

Year-end records

Purpose / facts / owner / evidence / date:

Choose the support you need

FREE PDF	Free	Use this public edition as an internal reference or printed working guide.
REUSABLE WORD TEMPLATE	Included	An editable Word version is available when it supports a related paid engagement.
CUSTOM WORK	Scoped	RiskWise can adapt, review, implement, document, or hand off the resource for your business.

Discuss a paid engagement

Call 702-421-1111 or email sales@ezypz.com and mention: S Corporation Year-End Checklist

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