# S CORPORATION SHAREHOLDER ANNUAL TAX REPORTING TEMPLATE

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Shareholder's Share of Income, Deductions, Credits, etc.

## PART I: IDENTIFYING INFORMATION

| S Corporation Details | Shareholder Details |
|---|---|
| **Corporation Name:** | **Shareholder Name:** |
| **Employer Identification Number (EIN):** | **Taxpayer Identification Number (SSN/ITIN):** |
| **Street Address:** | **Street Address:** |
| **City, State, ZIP Code:** | **City, State, ZIP Code:** |

| | |
|---|---|
| **Shareholder's percentage of stock ownership for tax year:** | % |
| **Number of shares held at start of tax year:** | |
| **Number of shares held at end of tax year:** | |

## PART II: SHAREHOLDER'S SHARE OF CURRENT YEAR INCOME, DEDUCTIONS, AND CREDITS

| Line | Income / Deduction / Credit Item | Amount ($) |
|---|---|---|
| 1 | Ordinary business income (loss) | |
| 2 | Net rental real estate income (loss) | |
| 3 | Other net rental income (loss) | |
| 4 | Interest income | |
| 5a | Ordinary dividends | |
| 5b | Qualified dividends | |
| 6 | Royalties | |
| 7 | Net short-term capital gain (loss) | |
| 8 | Net long-term capital gain (loss) | |
| 9 | Section 1231 gain (loss) | |
| 10 | Section 179 deduction | |
| 11 | Other deductions | |
| 12 | Credits | |
| 13 | Alternative Minimum Tax (AMT) items | |
| 14 | Items affecting shareholder basis (Distributions, tax-exempt income, non-deductible expenses) | |

## PART III: SHAREHOLDER BASIS & DISTRIBUTIONS SUMMARY (OPTIONAL / WORKSHEET)

| | |
|---|---|
| **1. Shareholder Stock Basis at Beginning of Tax Year:** | $ |
| **2. Plus:** Additional Capital Contributions during the year | $ |
| **3. Plus:** Shareholder's Share of Income / Gains (Lines 1 through 9 above) | $ |
| **4. Minus:** Shareholder's Share of Losses / Deductions (Lines 10 and 11 above) | $ |
| **5. Minus:** Distributions (Cash and fair market value of property distributed) | $ |

| | |
|---|---|
| **6. Shareholder Stock Basis at End of Tax Year (Line 1 + 2 + 3 - 4 - 5):** | $ |

## PART IV: DECLARATION & SIGNATURES

Under penalties of perjury, I declare that I have examined this report, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete.

| | |
|---|---|
| Signature of Corporate Officer | Date |
| Signature of Shareholder | Date |