

## BUSINESS TAX QUESTIONNAIRE

NAME OF BUSINESS: \_\_\_\_\_

### Questions Related to All Entities:

1. Were you required to file 1099's this year? Yes No  
If Yes, did you file them? (If Yes, Provide a copy of 1099s and 1096). Yes No
2. Has the business address changed since last year? (provide new address). Yes No
3. Were there any changes to your organization documents? Yes No  
*If yes, describe differences and provide a copy of amended docs.*  
\_\_\_\_\_
4. Has there been any change in ownership? If Yes, please explain. Yes No  
\_\_\_\_\_  
\_\_\_\_\_
5. Do you have an interest or signature authority over a financial account in a foreign country, such as a bank account, securities account or other financial account? Yes No
6. Does the business have any foreign or out of state shareholders or partners? Yes No
7. During the year, did the business have any debt that was cancelled, forgiven, or modified in terms? Yes No
8. Were there any changes in methods of determining quantities, cost, or valuations between opening and ending inventories? Yes No
9. Did the business pay taxes to any foreign governments? Yes No
10. Did the business incur any research and experimental expenditures during the year? Yes No
11. Did the business own and residential buildings providing qualified low income housing? Yes No
12. Is the business located in an empowerment zone? Yes No
13. Do you do business in states other than Pennsylvania? Yes No  
If yes, provide a list of all the states where you conduct business.
14. If the business owns vehicles, were they used 100% for business? Yes No  
If no, please attach a listing of vehicles, % used in business, business miles, commuting miles and total miles.
15. Did the business lease any vehicles? If yes, provide a list of vehicles, % used in business, business miles, commuting miles, fair market value and original lease date. Yes No
16. Was the vehicle available for personal use during off-duty hours? Yes No
17. Was the vehicle primarily used by more than a 5% owner or related person? Yes No
18. Is another vehicle available for personal use? Yes No

#### IRS CIRCULAR 230 DISCLOSURES:

Pursuant to Treasury Regulations, any tax advice contained in this communication (including any attachments) is not intended or written to be used, and cannot be used or relied upon by you or any other person, for the purpose of (i) avoiding penalties under the Internal Revenue Code, or (ii) promoting, marketing or recommending to another party any tax advice addressed herein.

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|---|-----|----|
| 19. Did the business pay any expenses to make the business accessible or usable by individuals with disabilities?   | Yes | No |
| 20. Did the business have payroll for employees and officers?<br>If Yes, attach copies of all W-2s, W-3 and a Payroll Summary for 2023.   | Yes | No |
| 21. During the year, did the business purchase an alternative fuel vehicle?   | Yes | No |
| 22. During the year, did the business receive a loan from or loan money to a partner or shareholder?<br>If Yes, are these loans documented with a signed note agreement?                          | Yes | No |
| 23. Did you purchase, sell or retire any Fixed Assets during the year?<br>Please provide a listing including Asset Description, Date of Disposal, sales price, year purchased and purchase price. | Yes | No |
| 24. Did you receive ERC money during the year? If so, were all applicable tax returns amended?  | Yes | No |
| 25. Did you take any distributions from the Company? If so, how much?   | Yes | No |

## Questions Related to Partnerships:

- |   |     |    |
|---|-----|----|
| 26. At any time during the year, was any partner in this partnership a disregarded entity, a trust, an S Corporation or estate? | Yes | No |
| 27. Was there a distribution of property or transfer of partnership interest by sale or death during the year?                  | Yes | No |

## Questions Related to Corporations:

- |   |     |    |
|---|-----|----|
| 1. Is the corporation a member of a controlled group of corporations?   | Yes | No |
| 2. Is this corporation a qualified personal service corporation?  | Yes | No |
| 3. At any time during the tax year, did one foreign person own, directly or indirectly 25% of the total voting power or the total value of all classes of this corporation's stock? | Yes | No |
| 4. Has the corporation made any estimated tax payments for the current year?  | Yes | No |
| 5. During the year, did the corporation pay dividends?  | Yes | No |
| 6. Have you elected to expense fixed asset additions under \$2,500?   | Yes | No |
| 7. Were health insurance premiums paid on behalf of S Corporation Shareholders included on form W-2?  | Yes | No |

## Documents Required:

1. Please provide a copy of your income statement, balance sheet and General ledger for the current year.
2. Please provide a schedule or list of all fixed assets purchased during the tax year, if not included elsewhere.
3. Please provide a schedule of federal and state tax payments made during tax year or after year-end that apply to the current tax year.

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## ADDENDUM TO BUSINESS TAX QUESTIONNAIRE FOR NEW CLIENTS

### Documents Required:

1. Please provide a copy of your prior year federal and state tax returns for the past three years, if applicable, if not already provided. Please ensure that a copy of the federal and state depreciation schedules are included as part of the tax return.
2. Please provide a copy of the Articles of Incorporation or partnership agreement, operating agreement, and all other organizational documents, if not already provided.
3. If the entity is an S-Corporation, please provide a copy of the IRS Form 2553 along with the IRS acceptance letter, if not already provided.
4. Please provide a copy of the state registration of the entity for the state of domicile of the business and all states where the business conducts business.
5. If applicable, please provide a copy of the Sales Tax certificate for the state of incorporation or partnership domicile.

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