



Questions for 2018:

Please provide supporting documentation where necessary

- YES / NO Did the business **buy, sell, or trade** any assets (items valued at \$500+) this year?
If yes, please provide any paperwork involved.
- YES / NO Did the business make any purchases this year that sales tax was **not** paid on? Sales tax must be paid on all purchases including out-of-state and internet purchases.
If yes, please provide any paperwork involved.
- YES / NO Did the business borrow money from any source this year?
If yes, please provide loan documents involved in this transaction.
- YES/NO Did you receive any correspondence from any taxing authority or government agency regarding financial matters this year?
If yes, please provide copies of the correspondence.
- YES / NO Do you currently have company Health Insurance provided to employees or yourself?
If yes, please provide the amount of health insurance paid on behalf of each employee.
- YES / NO Do you have current and completed W-4's and I-9's on file for each employee?
If yes, please be sure your software and employee records are up to date.
If no, be sure and get the appropriate documents from your employees ASAP.
- YES / NO Do you have current and completed W-9's on file for each vendor/subcontractor?
If yes, please be sure your software records are up to date.
If no, be sure and get the appropriate documents from your vendor / subcontractor ASAP.
- YES / NO Have you reviewed and verified your AP, AR, and loan balances for accuracy?
If you have questions, please include documentation.
- YES / NO Do you have any business loans, equipment loans, or a line of credit?
If yes, please include the 12/31 statement(s).
- YES / NO Did you read the Annual Letter, accurately fill out this questionnaire, sign and date the 1099 Engagement Letter and provide all necessary supporting documentation? ☺

The above information is complete and accurate to the best of my knowledge.

Signature _____

Date _____