

BUSINESS NAME: _____

Please complete the following 2 pages, sign and return it to our office. Thank you!

MISCELLANEOUS INFORMATION

YES NO

- 1) Did your address, email or phone number change in 2019? Please provide your current email address _____
- 2) Were there any changes to the business in 2019?
- 3) Were there any amendments/changes to the articles of incorporation, bylaws, partnership or operating agreement, certificate of limited partnership, or articles of organization?
- 4) Were there any changes in shareholders, partners or business ownership?
- 5) Does the business have any foreign partners, members or shareholders?
- 6) Were there any changes to the owner capital accounts? If so, indicate the amount of capital contributed and/or distributed to/from each pertinent account.
- 7) Has the business been notified or contacted by the IRS for any tax issue?
- 8) Will the business file all required federal and/or state informational returns (Form W-2, 1098, 1099, etc.)?
- 9) Did the business use a home office during the year?
- 10) Did the business have an interest in or have signing authority on a Foreign Bank Account or Financial Account?
- 11) During the tax year, did the business have assets in or operate a business outside of the US?
- 12) Does anyone owe the business money which has become uncollectible? If so, please provide details and documentation.
- 13) Were there any changes to debt in the current year? If so, please include paperwork and indicate the amount of new debt acquired and/or the amount of debt paid off. (12/31 statements)
- 14) Did the business have any debt canceled, forgiven, or have the terms of any debt modified?
- 15) Do you want to receive your 2019 tax return copy electronically?

INCOME / EXPENSES

YES NO

- 16) Did the business purchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.), or convert any personal assets to business use? If so, please provide each asset's purchase or sale documentation.
- 17) Did the business make any purchases in 2019 that sales tax was not paid on? Sales tax must be paid on all purchases made by the end user, including out-of-state and internet purchases.
- 18) Did the business have charitable contributions for 2019? If yes, be sure and provide **all** supporting statements and **all** documentation.
- 19) Did the business generate revenue in whole within the U.S.?
- 20) Did the business earn any tax-exempt income/expenses during the tax year?
- 21) Did the business have any foreign income or pay any foreign taxes (not already included on your investment statements)?
- 22) Were any corporate estimated tax payments made for this tax year?
- 23) Did the business pay penalties or fines during the tax year? Please provide details.
- 24) Does the business provide medical insurance coverage for employees? Does it cover all employees?
- 25) Does the business pay for and provide medical insurance coverage for owners/officers/partners? Please provide amounts paid for each person.
- 26) Does the business pay or provide any fringe benefits to partners or more than 2% S Corporation shareholders? Please provide details.
- 27) Does the corporation/partnership provide vehicles to employees, shareholders, or partners for personal use? Please provide details.
- 28) Does the business have an accountable reimbursement policy for employee paid expenses? Please provide details.

Please sign and date below:

Client / Taxpayer

Date