

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

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

**MISCELLANEOUS INFORMATION FOR TAX YEAR 2021**

**YES NO**

- 1) Did your address, email or phone number change in 2021? Please provide updated contact information.
- 2) Please describe your trade or business activity in detail: \_\_\_\_\_  
\_\_\_\_\_
- 3) Are there any changes to the business for 2021?
- 4) Are there any amendments / changes to the articles of incorporation, bylaws, partnership or operating agreement? Please provide documentation.
- 5) Are there any changes in shareholders, partners or business ownership?
- 6) Please provide the name of the tax matters shareholder / partner for the business: \_\_\_\_\_
- 7) Does the business have any foreign partners, members or shareholders?
- 8) Does the business employ ANY family members of the shareholders, partners or owners? Please provide details.
- 9) Were there any changes to the owner capital accounts? Please provide details on contributions and distributions to / from each owner.
- 10) Has the business been notified or contacted by the IRS for any tax issue?
- 11) Will or did the business file all required federal and/or state informational returns (Forms W-2, W-3, 1099, 1096, etc.)? If not prepared by this office, please provide copies of all forms filed.
- 12) Please provide **ALL** 12/31 business bank and investment statements.
- 13) Did the business have an interest in or have signing authority on a Foreign Bank Account or Financial Account?
- 14) During the tax year, did the business have any financial interest in crypto currency, or accept payment or pay for expenses with crypto currency?
- 15) Were there any changes to debt in the current year? Please provide **ALL** 12/31 loan statements and paperwork for newly acquired debt.
- 16) Did the business receive a PPP loan, EIDL loan, any grant, or other COVID related funding in 2021? Please provide details and documentation on **ALL** funding if you have not already done so.
- 17) Did the business have any debt canceled, forgiven, or have the terms of any debt modified? Please provide details and documentation.
- 18) Does anyone owe the business money which has become uncollectible?

INCOME / EXPENSES FOR TAX YEAR 2021

**YES NO**

- 19) During the tax year, did the business have assets in or operate a business outside of the US?
- 20) Did the business generate revenue in whole within the U.S.?
- 21) Did the business purchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.), or convert any personal assets to business use? Please provide each asset's purchase or sale documentation.
- 22) Did the business make any purchases in 2021 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.
- 23) Did the business have charitable contributions for 2021? If yes, be sure and provide **ALL** supporting statements and documentation.
- 24) Did the business have any tax-exempt income / expenses during the tax year?
- 25) Did the business have any foreign income or pay any foreign taxes (not already included on your investment statements)?
- 26) Did the business have a substantial decrease in revenue (at least 25%) in any one calendar quarter in 2021 compared to the same calendar quarter in 2019?
- 27) Were any corporate estimated tax payments made for this tax year?
- 28) Did the business pay penalties or fines during the tax year?
- 29) Did the business pay any COVID related sick pay or sick leave in 2021? Please provide details and documentation.
- 30) Did the business take the COVID related Employee Retention Credit in 2021? If yes, and not prepared by this office, please provide copies of **ALL** 941 tax filings.
- 31) Does the business provide medical insurance coverage for employees? Does it cover all employees?
- 32) Does the business pay for and provide medical insurance coverage for owners/officers/partners? Please provide amounts paid for each person.
- 33) Does the business pay or provide any fringe benefits to partners or more than 2% S Corporation shareholders? Please provide details.
- 34) Does the corporation / partnership provide vehicles to employees, shareholders, or partners for personal use? Please provide details.
- 35) Does the business have an accountable reimbursement policy for employee paid expenses? Please provide details.
- 36) Do you want to receive your 2021 tax return copy electronically?

**Please sign and date below:**

\_\_\_\_\_  
Client / Taxpayer

\_\_\_\_\_  
Date