

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

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

**YES NO**

**MISCELLANEOUS INFORMATION FOR TAX YEAR 2022**

- |                          |                          |   |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | 1) Did your address, email or phone number change? Please provide updated contact information.  |
| <input type="checkbox"/> | <input type="checkbox"/> | 2) Were there any changes to the business? _____  |
| <input type="checkbox"/> | <input type="checkbox"/> | 3) Were there any amendments / changes to the articles of incorporation, bylaws, partnership or operating agreement? Please provide documentation.  |
| <input type="checkbox"/> | <input type="checkbox"/> | 4) Were there any changes in shareholders, partners or business ownership?  |
| <input type="checkbox"/> | <input type="checkbox"/> | 5) Please provide the <b>name of the tax matters shareholder / partner</b> for the business: _____  |
| <input type="checkbox"/> | <input type="checkbox"/> | 6) Does the business have any foreign partners, members or shareholders?  |
| <input type="checkbox"/> | <input type="checkbox"/> | 7) Does the business employ <b>ANY</b> family members of the shareholders, partners or owners? Please provide details.  |
| <input type="checkbox"/> | <input type="checkbox"/> | 8) Were there any changes to the owner capital accounts? Please provide details.  |
| <input type="checkbox"/> | <input type="checkbox"/> | 9) Did a shareholder, partner, or owner loan money to the business? Please provide a copy of the <b>promissory note</b> .   |
| <input type="checkbox"/> | <input type="checkbox"/> | 10) Has the business been notified or contacted by the IRS for any tax issue? Please provide copies of all IRS correspondence.  |
| <input type="checkbox"/> | <input type="checkbox"/> | 11) Will or did the business file all required federal and/or state informational returns (Forms W-2, W-3, 1099, 1096, WA DOR, etc.)? If not prepared by this office, please provide copies of all forms filed. |
| <input type="checkbox"/> | <input type="checkbox"/> | 12) Please provide <b>ALL</b> 12/31 business bank and investment statements.  |
| <input type="checkbox"/> | <input type="checkbox"/> | 13) Did the business have an interest in or have signing authority on a Foreign Bank Account or Financial Account?  |
| <input type="checkbox"/> | <input type="checkbox"/> | 14) Did the business have any financial interest in digital assets, or accept payment or pay for expenses with crypto currency? Please provide details.   |
| <input type="checkbox"/> | <input type="checkbox"/> | 15) Were there any changes to debt? Please provide <b>ALL 12/31 loan statements</b> .   |
| <input type="checkbox"/> | <input type="checkbox"/> | 16) Did the business receive PPP forgiveness in 2022? Please provide a copy of the forgiveness application, if you have not already done so.  |
| <input type="checkbox"/> | <input type="checkbox"/> | 17) Did the business receive or apply for the ERTC (Employee Retention Tax Credit), <b>not prepared by this office</b> ? If so, please provide <b>ALL</b> documentation.  |
| <input type="checkbox"/> | <input type="checkbox"/> | 18) Did the business have any debt canceled, forgiven, or have the terms of any debt modified? Please provide details and documentation.  |
| <input type="checkbox"/> | <input type="checkbox"/> | 19) Does anyone owe the business money which has become uncollectible?  |

**YES NO**

**INCOME / EXPENSES FOR TAX YEAR 2022**

- ☐ ☐ 20) Did the business have assets in or operate a business outside of the US?
- ☐ ☐ 21) Did the business generate revenue in whole within the U.S.?
- ☐ ☐ 22) 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.
- ☐ ☐ 23) Did the business make any purchases 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.
- ☐ ☐ 24) Did the business have any charitable contributions? If yes, be sure and provide **ALL** supporting statements and documentation.
- ☐ ☐ 25) Did the business have any tax-exempt income / expenses?
- ☐ ☐ 26) Did the business have any foreign income or pay any foreign taxes (not already included on your investment statements)?
- ☐ ☐ 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) Does the business provide medical insurance coverage for employees? Does it cover all employees? \_\_\_\_\_
- ☐ ☐ 30) Does the business pay for and provide medical insurance coverage for owners/officers/partners? Please provide amounts paid for each person.
- ☐ ☐ 31) Does the business administer any type of retirement plan? If so, what type of plan? \_\_\_\_\_
- ☐ ☐ 32) Does the business pay or provide any **fringe benefits** to employees, partners or more than 2% S Corporation shareholders? Please provide details.
- ☐ ☐ 33) Does the corporation / partnership provide vehicles to employees, shareholders, or partners for personal use? Please provide details.
- ☐ ☐ 34) Does the business have an accountable reimbursement policy for employee paid expenses? Please provide a copy of the plan.
- ☐ ☐ 35) Do you want to receive your 2022 tax return copy electronically?

**Please sign and date below:**

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

\_\_\_\_\_  
Date