

2015 Business Tax Questionnaire

Please answer the following questions. If you are not sure of the answer, please leave it blank and we can discuss it. **If you don't return this questionnaire with your tax information, we will assume that the answers to these questions are "No".**

Y N 1. Did your business name or address change during the year?

Y N 2. Did the ownership of your business change during the year?

Y N 3. Did the officers or managers of your business change during the year?

Y N 4. Did you purchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.), or convert any personal assets to business use? Please provide details.

Y N 5. Did you have any foreign income or pay any foreign taxes (other than in US brokerage accounts)?

Y N 6. Did you have bartering transactions or "trades" that are not included in the financial information that you have provided?

Y N 7. Did your business provide health insurance for your employees?

Y N 8. Does your business have a retirement plan in place? What type of plan do you have? _____

Y N 9. What other benefit plans does your company offer? Please list:

Y N 10. Does your company maintain written evidence to support automobile and travel expenses? This written evidence can include employee expense reports, mileage logs, calendars and, if you deduct actual expenses, receipts. This information is required by regulations.

Y N 11. If automobile or truck expenses are reported, please provide a list, by vehicle, of the total miles driven, and business miles driven.

Y N 12. Did you receive copies of Forms 1099, Schedules K-1, and any other tax information forms from individuals or businesses to whom you provided services? Please provide them for our records.

Y N 13. Do you conduct activities in other states? Please provide details.

Y N 14. Was your business notified of a change in prior year returns or audited by either the Internal Revenue Service or the State taxing agency? Please provide copies if we do not already have them.

Y N 15. May the IRS discuss your tax return with your tax preparer?

Y N 16. Did you have an interest in or signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account?(Foreign Stocks held in a US brokerage account do not count. If you have signature authority over an account, you should answer Yes.

Y N 17. Did you have stock, or any other ownership interest in any foreign corporation, partnership, trust, estate, fund or other entity that is not held in a US brokerage account), or any financial instrument or contract issued by a foreign person or business?

Y N 18. Was your business required to file Forms 1099 for service providers to whom you paid \$600 or more in 2015?

Y N 19. If the answer is yes, have you filed the required forms 1099 or will you file them by the due date?

Other information and notes: ¶

Are there any issues that you would like to discuss with us or topics about which you would like additional information

Are there other comments that you would like to share with us?

We want to provide first-rate service to each of our clients. Do you have any suggestions as to how we can improve the level of service we provide you?