

Check box if YES. If answer is NO or not applicable, leave blank.

Note: The word YOU means the business, not the person completing the form.

- 1 [ ] Will ALL income be reported to the tax preparer, taxable or not?  
If this answer is not YES, please explain \_\_\_\_\_
- 2 [ ] Do you prefer receiving your return copy by e-mail?
- 3 [ ] Has your telephone, fax, cell phone number, or e-mail address changed?
- 4 [ ] Has your address or state of residence (incorporation) changed?
- 5 [ ] If you need this return by a specific date, provide date & reason. \_\_\_\_\_
- 6 [ ] If any income was earned outside Texas, do you want us to prepare a return for that state? If yes, enter state(s) \_\_\_\_\_
- 7 [ ] If any income was earned in Texas, do you NOT want us to prepare the TX margin tax return? **Note: We will prepare this return if the box is NOT checked.**
- 8 [ ] Has an extension been filed? If so, enter amount paid, if any \_\_\_\_\_
- 9 [ ] Has IRS or a state corrected or audited a return since we last met?
- 10 [ ] Has the address of any owner changed since last year's return? If yes, list.
- 11 [ ] Have the ownership percentages or capital accounts changed in any way?
- 12 [ ] Have you ever declared bankruptcy or filed IRS Form 982? What year? \_\_\_\_\_
- 13 [ ] Do you own or have signature authority on a FOREIGN bank or investment account?
- 14 [ ] Did you operate for less than 12 months? If yes, give dates \_\_\_\_\_
- 15 [ ] Did you do any bartering or trading, or belong to a barter club?
- 16 [ ] Did you have any debt refinanced, canceled, forgiven or restructured?
- 17 [ ] Did you borrow or loan over \$10,000 to an owner that is **not in writing**?
- 18 [ ] Do you have any loans that are guaranteed or co-signed?
- 19 [ ] Do you rent or lease any property to owners or their businesses?
- 20 [ ] Do you rent or lease any property from owners or their businesses?
- 21 [ ] Did you start a new activity or invest in a partnership this year?
- 22 [ ] Did you have any owners NOT "materially participate" in the management of the business? If yes, who \_\_\_\_\_
- 23 [ ] If you own rental units, did you have any owners NOT "actively participate" in their management? If yes, who \_\_\_\_\_
- 24 [ ] Did you sell, trade, or cease using any assets listed on the depreciation sched?
- 25 [ ] If yes, were any of those assets acquired originally from an owner?
- 26 [ ] Did the percentage of business use change for any assets?
- 27 [ ] Did you buy, sell, exchange, reposses or have foreclosed any real estate?
- 28 [ ] Did you sell or trade any investments (including collectibles)?
- 29 [ ] Did you have any investments that became worthless this year?
- 30 [ ] Did you have any casualty or theft losses?
- 31 [ ] Did you receive any non-taxable income (muni interest, insurance, damages)?
- 32 [ ] Did you pay medical insurance premiums for any 2% or more owner?
- 33 [ ] If you deduct ANY expenses for entertainment and business meals, do you maintain the detailed WRITTEN information that IRS requires?
- 34 [ ] Do you own or lease any vehicles not used 100% for business?
- 35 [ ] If you deduct any expenses for business vehicles or personal-use assets (such as cell phones), do you have logbooks or other WRITTEN evidence showing the business use?
- 36 [ ] If you deduct charitable donations, do you have a receipt or document for each?
- 37 [ ] Do any owners own an interest in any other entity in the same field of business?

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I have reviewed the questions answered here and the data in the accompanying worksheets and data and to the best of my knowledge it is true, correct, and complete. I have also read the professional services agreement printed on the back of this page and agree to its provisions.

Signature \_\_\_\_\_ Date \_\_\_\_\_

Title \_\_\_\_\_

Business Name \_\_\_\_\_