

Check box if **YES** or you have a question. If answer is **NO** or **N/A**, please **leave blank**.
YES Note: The word YOU means the business, not the person completing the form.

- 1 Check: I want my return copy to be [] paper mailed, [] pdf e-mailed, or [] both (\$35)
- 2 [] Will ALL income be reported to the tax preparer, taxable or not?
If this answer is not YES, please explain _____
- 3 [] If you need this return by a specific date, provide date & reason. _____
- 4 [] Has your telephone, fax, address, cell phone number, or e-mail address changed?
- 5 [] Has your name, fed id #, or state of residence changed? Date _____
- 6 [] If any income was earned outside Texas, do you want us to prepare a return for that city, state or country? If yes, enter each jurisdiction _____
- 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 blank.**
- 8 [] Has an extension been filed? If so, enter amount paid, if any _____
- 9 [] Did you file all required Form W-2s and 1099-NECs by January 31, 2021?
- 10 [] Has IRS or a state corrected or audited a tax return since we last met?
- 11 [] Has the address of any owner changed since last year's return? If yes, list.
- 12 [] Have the ownership percentages or capital accounts changed in any way?
- 13 [] Have you ever declared bankruptcy or filed IRS Form 982? What year? _____
- 14 [] Did you operate for less than 12 months? If yes, give dates _____
- 15 [] Did you do any trading; belong to a barter club; buy or sell Virtual Currency?
- 16 [] Did you have any debt refinanced, canceled, forgiven or restructured?
- 17 [] Do you have any investments whose statements do NOT have a US return address?
- 18 [] Did you borrow or loan any amount to an owner that is **NOT in writing**?
- 19 [] Did you borrow or loan over \$10,000 to an owner at interest rate of less than 3%?
- 20 [] Do you have any loans guaranteed or co-signed by owners, relatives or anyone else?
- 21 [] Do you rent or lease any property to owners or their businesses? They issue 1099.
- 22 [] Do you rent or lease any property from owners or their businesses? You issue 1099.
- 23 [] Did you start a new activity or invest in a partnership this year?
- 24 [] Did you have any owners NOT "materially participate" in the management of the business? If yes, who _____
- 25 [] If you own rental units, did you have any owners NOT "actively participate" in their management? If yes, who _____
- 26 [] Did you sell, trade, or cease using any assets listed on the depreciation sched?
[] If yes, were any of those assets acquired originally from an owner?
- 27 [] Is the percentage of business use for any asset or vehicle less than 100%?
- 28 [] Did you buy, sell, exchange, repossess or foreclose any real estate?
- 29 [] Did you sell or trade any investments (including collectibles, coins, metals)?
- 30 [] Did you have any investments or loans that became worthless this year?
- 31 [] Did you have any casualty or theft losses?
- 32 [] Did you have any non-taxable income (muni interest, insurance, damages, PPP Loan)?
- 33 [] Did you pay medical insurance premiums for any 2% or more owners or relatives?
- 34 [] If you deduct ANY expenses for business meals, do you maintain the detailed WRITTEN information that IRS requires?
- 35 [] If you deduct any expenses for business vehicles or personal-use assets, do you have logbooks or other WRITTEN evidence showing the business use? If yes, please provide us a copy of one page of the log.
- 36 [] For charitable donations, do you have a receipt or document for EACH over \$250?
- 37 [] Do any owners own a more than 2% interest in any other entity (corp, K-1)?

I have reviewed the questions answered here and the data in the accompanying worksheets 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 _____