

**2011 BUSINESS TAX QUESTIONNAIRE**

**General Information**

Name: \_\_\_\_\_  
Primary e-mail: \_\_\_\_\_  
Address change? \_\_\_\_\_  
Any phone number changes? \_\_\_\_\_

**Questions**

**Yes No**

- Have you received any correspondence or paid any fines/penalties from the IRS that has not been brought to our attention? (If yes, attach copies of all correspondence.)
- Did you have an interest in or signature authority over a foreign financial account or have financial accounts/assets/interests maintained or issued by a foreign entity?
- Do you conduct business in any other state? List: \_\_\_\_\_
- Did your business participate in any barter transactions?
- Did your business issue all required 1099 forms? None required
- Did your business have any debt forgiven or file for bankruptcy?
- Please review the depreciation schedule provided to you. Did you sell, convert to personal use or otherwise dispose of any of the business assets? If yes, please indicate on the schedule and return it to us.  
  
Do you have the proper documentation to support the following:  
**Y N N/A**
  - Travel expenses
  - Business entertainment & meals
  - Gifts (\$25 per client)
  - Automobile expenses (log)
  - Charitable contributions (signed acknowledgement letter for donations over \$250)
- Has the personal use of your business automobile been calculated?
- Did you provide any employee benefits? If so, please list: \_\_\_\_\_
- Do you have any other mixed-use assets (used for personal and business purposes)?
- Are there any changes to your business we need to be aware of (examples: change in ownership, new services, and change in entity structure?)  
\_\_\_\_\_  
\_\_\_\_\_

**Signature** \_\_\_\_\_

**Date** \_\_\_\_\_