



2024 Business Tax Questionnaire

Client Name _____ Date _____

Email address: _____ Phone # _____

**NOTE: IF "YES" TO ANY OF THE QUESTIONS BELOW,
PLEASE PROVIDE ADDITIONAL DETAILS AND/OR DOCUMENTATION**

New Federal Reporting Requirement – Beginning on January 1, 2024, many companies in the U.S. will have to report information about their beneficial owners (i.e. individuals who own or control the company). This will need to be reported to FinCEN. You may go to <https://www.fincen.gov/boi> for more information.

Did you file your Beneficial Owner Information Report (BOIR)?

- Yes, the report has been filed.
- No, I will comply with the filing requirements.

• Yes • No Are you paying monthly installments on an SBA EIDL Loan?

• Please provide a year-end statement showing interest and remaining balance due. _____

• Yes • No Do you want an electronic copy of your tax return? If yes, it will be uploaded to your secure portal.

• Yes • No Did your address change? _____

• Yes • No Did you receive, sell, send, exchange or acquire any financial interest in any virtual currency? ___

• Yes • No Did you earn any income that is not reported on your tax documents provided to us? _____

• Yes • No Do you have any interests in a foreign corporation/partnership/stock? _____

• Yes • No Did you do business in any other states? _____

• Yes • No Did you file all your Gross Receipts reports with NMTRD for the tax year? _____

• Yes • No Did you receive any IRS or State correspondence (notices or changes to prior year returns)? ___

• Yes • No Did you make any payments that would require you to file Forms 1099? _____

• Yes • No If "Yes" did you or will you file required Forms 1099? _____

• Yes • No Did you purchase, sell or dispose of any business assets? _____

• Yes • No Did you contribute any assets or business property? _____

• Yes • No Did you take any assets or business property for personal use? _____

• Yes • No Did you form any new business or terminate any old business? _____

• Yes • No Do you have any employees? _____

• Yes • No Do you have an Accountable Plan for expense reimbursements? _____

• Yes • No Did you trade any business property or services? _____

• Yes • No Is there anything else that might affect your taxes for this tax year? _____

Notice Protection Plan

Each year the IRS sends millions of letters for various reasons. Some require just a simple response. Others are more complex, sometimes requiring detailed explanations or request of additional documents.

Tax & Accounting Solutions LLC offers an optional worry-free notice protection plan for business tax filings. For enrolled clients, we will review, research and appropriately respond to any letter you receive about your tax return for the year enrolled.

The plan fee will show up as a separate line-item on your next tax preparation invoice.

Information on the Notice Protection Plan for business is attached.

- I would like to enroll in Tier 1 for peace of mind!
- I would like to enroll in Tier 2 for additional audit support!
- No, I would prefer to opt-out of this service.

I understand that by opting out of the Notice Protection Plan, I will be charged the standard hourly rate should I need assistance with a tax notice.

Do we have all your documents to proceed with preparing your tax return? • Yes • No

Please note, we cannot start on your return preparation until we have received all tax documents.

I have reviewed the information on this form and to the best of my knowledge it is true, correct, and complete. I acknowledge that I have maintained adequate documentation to substantiate all deductions that I have claimed.

Authorized Representative

Date

Signature

Title

Additional Notes / Comments

Reviewed / Interviewed by: _____