



## Year-End Tax Corporate Questionnaire

### 1. FOREIGN ACCOUNTS

- a. Do you have a financial interest in, or signing power over, a bank, securities, and assets including property or other financial accounts in a foreign country? \_\_\_\_\_ Yes \_\_\_\_\_ No
- b. If yes, did the balance exceed \$10,000 in 2023? \_\_\_\_\_ Yes \_\_\_\_\_ No

### 2. OTHER

- a. I have adequate records or sufficient written evidence to justify these deductions. \_\_\_\_ Yes \_\_\_\_ No
- b. I have provided all income received from all sources for the current year. \_\_\_\_ Yes \_\_\_\_ No  
Note that having substantiation for Travel, Meals and Entertainment is critical.

### 3. TAX RETURN COPY

How would you like to receive your tax return? \_\_\_\_ Paper \_\_\_\_ Digital

**NOTE: Due to the increase cost of postage, mailed returns may incur an additional cost.**

By signing below, you are acknowledging that we will be preparing the tax return based solely on the information that you have provided, for which we have not vouched the validity of. When signing the return, you are taking final responsibility for the accuracy of the information on the return.

You are also responsible to retain proper documentation for all expenses and deductions that you are taking. If you are unsure about the documentation needed call our office for assistance.

Company Name \_\_\_\_\_

Printed Name \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_