

BUSINESS TAX QUESTIONNAIRE

Business Name: _____ **Tax Year** _____

Please answer the following questions to determine maximum deductions:	YES	NO
What is your mailing address?		
Is the business primary physical address different from the mailing address?		
If yes, what is the businesses physical address?		
Would you like to sign up to receive text messages regarding your account (return status, appointments, etc.)		
If yes, what number would you like us to use for texting _____ Contact Name _____		
Was there a change in ownership/shareholders/partners during the year?		
Did you receive unreported income? (i.e., not reported on Form 1099-MISC and/or 1099-NEC)		
Did you buy or sell any equipment or business property? Date, Description, \$\$\$ of each.		
Did you take out any loans for the business?		
Did you make any contributions to a retirement plan (401(k), SEP, IRA, etc.)?		
Did you go through bankruptcy, foreclosure, or repossession proceedings?		
Did you incur a loss because of damaged or stolen property?		
Did you work from a home office? If YES, submit Home Office form.		
May the IRS discuss your tax return with your preparer?		
Were you a citizen of, have income from, or live in a foreign country?		
Do you buy any internet merchandise for which you did not pay sales/use tax?		
Do you have any foreign bank accounts?		
Did you use your car for business?		
Did you maintain a written log or document for your business use of auto mileage?		
Do you have a company policy to reimburse out of pocket business expenses incurred by employees, partners, shareholders, or owners?		
Do you have an operating agreement for your business entity?		
Did you maintain a business bank account?		
Did you keep receipts and records to verify all business expenses per IRS requirement?		
How do you track your business expenses? <input type="checkbox"/> QuickBooks Desktop <input type="checkbox"/> QuickBooks Online <input type="checkbox"/> Excel <input type="checkbox"/> Google Sheets <input type="checkbox"/> Other Financial Software (Please indicate) <input type="checkbox"/> Manually (Pen/Paper) <input type="checkbox"/> I don't, I drop my receipts off for GVC to total		
Did you have payroll during the year?		
If yes, did a company other than GVC prepare your payroll returns?		
If yes, check all the payroll forms that were filed with IRS. <i>(Disregard if GVC prepares your payroll returns)</i> Form 940 <input type="checkbox"/> Form 941 <input type="checkbox"/> Form 943 <input type="checkbox"/> Form 944 <input type="checkbox"/>		
Forms W3/W2 <input type="checkbox"/> # W2's issued? (Box c on W3)		

Note: If you answered YES to any of the above, please provide further details.

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Please answer the following questions to determine maximum deductions:	YES	NO
Did you make any make any payments that would require you to file Form(s) 1099?		
If yes, did GVC or did you file the required Form(s) 1099 with IRS?		
Were you required to file Form 945 for any 1099's issued?		
At any time during 2023, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)?		

Signature: _____ Date: _____

Note: If you answered YES to any of the above, please provide further details.