

# BUSINESS TAX QUESTIONNAIRE

**Business Name:** \_\_\_\_\_ **Tax Year** 2024

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 maintain a business bank account?		
Did you receive unreported income? (i.e., not reported on Form 1099-MISC and/or 1099-NEC)		
Did you make any payments that would require you to file Form(s) 1099?		
If YES, did you or GVC file the required Form(s) 1099 with the IRS? <input type="checkbox"/> I filed <input type="checkbox"/> GVC filed <input type="checkbox"/> Not Filed		
Did you make any contributions to a retirement plan (401(k), SEP, IRA, etc.)?		
Did you take out any loans for the business?		
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.		
Are you a citizen of, have income from, or live in a foreign country?		
Do you have any foreign bank accounts?		
Do you buy any internet merchandise for which you did not pay sales/use tax?		
Did you use your car for business?		
If YES, did you maintain a written log or document your business use of auto mileage?		
Do you have a reimbursement policy for out-of-pocket business expenses incurred by employees, partners, shareholders, and/or owners?		
Do you have an operating agreement for your business entity?		
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 <input type="checkbox"/> Manually (Pen/Paper) <input type="checkbox"/> I don't, I drop my receipts off for GVC to total <i>(Please indicate)</i>		
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.    Form 940 <input type="checkbox"/> Form 941 <input type="checkbox"/> Form 943 <input type="checkbox"/> Form 944 <input type="checkbox"/> <i>(Disregard if GVC prepares your payroll returns)</i>		
Forms W3/W2 <input type="checkbox"/> # W2's issued? <i>(Box c on W3)</i>		

**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
At any time during 2024, did you receive, sell, exchange, gift, or otherwise dispose of a digital asset (e.g., cryptocurrency, NFTs)?				
May the IRS discuss your tax return with your preparer?				
How would you like to receive your tax return?	<input type="checkbox"/> Digital Copy	<input type="checkbox"/> Paper Copy	<input type="checkbox"/> Both	

**Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

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