

Business Questionnaire

Name of Company: _____

Contact: _____

Are you submitting your personal return today also? ☐ Yes ☐ No

Is your business permanently closed with no intention of reopening it? ☐ Yes ☐ No

If yes, as of what date: _____

Did you buy any equipment or vehicles in 2022? ☐ Yes ☐ No

If yes, did you provide loan or purchase documents to us?

Did you receive or apply for an Employee Retention Credit (ERC)? ☐ Yes ☐ No

Who does your payroll? _____

Do you use Quickbooks Online? ☐ Yes ☐ No

Do you use Quickbooks Desktop? ☐ Yes ☐ No

If yes, what version? _____ Current Password _____