

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: _____

Were you required to file 1099 forms? ☐ Yes ☐ No
If yes, did you file the required forms? ☐ Yes ☐ No

Did you buy any equipment or vehicles in 2024? ☐ 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

Did you make the Pass Through Entity election? ☐ Yes ☐ No
If yes, did you make state estimated tax payments? ☐ Yes ☐ No
If yes, provide dates and amounts paid.

Date: _____ Amount: _____ Date: _____ Amount: _____

Date: _____ Amount: _____ Date: _____ Amount: _____

Who does your payroll? _____

Do you use QuickBooks Online? ☐ Yes ☐ No

Do you use QuickBooks Desktop? ☐ Yes ☐ No

If yes, what version? _____ Current Password _____