TD CONSULTING GROUP, PC

CPAs, Tax and Business Advisors

BUSINESS QUESTIONNAIRE

Business Name: _____ Date: _____

	Yes	No
Were there any changes to ownership or sale of sale or shares/interest during the year, or are you expecting any changes?	☐	☐
Did the mailing or physical address of the business change?	☐	☐
Were there any significant changes to the operations of the business?	☐	☐
Did the business dispose of any equipment, vehicles, or furniture?	☐	☐
If the company maintains inventory, was there a change in the method for determining quantities, cost, or valuations between opening and closing inventory during the year?	☐	☐
If applicable, was the inventory valued at the end of the year?	☐	☐
Did the business take out any new loans or lines of credit this year?	☐	☐
Did the business file or will it file all required 1099s?	☐	☐
Does the company pay for disability or life insurance to its employees?	☐	☐
Does the company offer health insurance to its employees?	☐	☐
Did you make any federal, state, or local tax payments?	☐	☐
Were there any sales generated in other states or the City of Portland and/or Multnomah County?	☐	☐
Does the company have ownership of or signature authority over foreign bank accounts or ownership in any foreign assets?	☐	☐
At any time during the year, did the business receive or sell, exchange, or otherwise dispose of a digital asset (or financial interest in a digital asset)?	☐	☐
Have you recently received any notices or correspondence from a government agency?	☐	☐
Does the company expect any significant changes to income or expenses in the next year?	☐	☐
Have you documented an exit strategy for your business?	☐	☐
Would you like us to evaluate and review your company health and overall performance using metrics, ratios, and industry comparisons?	☐	☐

Comments: