

# Business Questionnaire

Name of Company: \_\_\_\_\_

Contact: \_\_\_\_\_

Were there changes in ownership in 2025? \_\_\_Yes \_\_\_No  
If yes, please provide names and percentages

\_\_\_\_\_  
\_\_\_\_\_

Did your address change from last year? *If so, please provide your new address.* \_\_\_Yes \_\_\_No

\_\_\_\_\_

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 2025? \_\_\_Yes \_\_\_No  
If yes, did you provide loan or purchase documents to us?

At any time during 2025, 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)? \_\_\_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. Do not list payments made for personal taxes.*

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 \_\_\_\_\_