

## Business Client Intro Questions

1. What is your business entity type?  
S Corp    C Corp    Partnership    Sole Proprietor
- Yes  No 2. If you elected to be an S Corp, did you receive a confirmation letter from the IRS?
- Yes  No 3. Will this be the first tax return filed for this entity?
- Yes  No 4. Do you have an external bookkeeping service?
- Yes  No 5. Does the business have more than one owner?
- Yes  No 6. Did you receive any correspondence from the IRS or State Department of Taxation in the last 2 years?
- Yes  No 7. Did you have any debts cancelled, forgiven, or refinanced during the tax year to be filed?
- Yes  No 8. Did you go through bankruptcy proceedings in the past 2 years?
- Yes  No 9. Do you have a detailed Income Statement and Balance Sheet?
- Yes  No 10. Do you have a detailed depreciation schedule?
- Yes  No 11. Did you make estimated tax payments during the year?
- Yes  No 12. Did you (or do you plan to) send out 1099s by January 31st to independent contractors you paid over \$600 during the tax year?
- Yes  No 13. Are there any significant changes between last tax year and this tax year?  
If yes, please provide a brief list below: