

Please let us know if of these apply!

Business Name _____ Tax Year 2023

1. Do you have a foreign bank account or assets? **Yes or No** _____
2. At any point in the year, has your business sold or exchanged any interest in any Virtual Currency? (Example: Bitcoin)

Yes or No _____

Questions below, please let us know if these changed since you last filed a return:

3. Was there a change in ownership since you last filed?

Yes or No _____

4. Did you buy or sell any assets? **Yes or No** _____
(Example: Vehicles, Computers, Power Tools, Furniture, Electronics)

5. Did you move or are you using a different mailing Address from your last filed return (If you were not in business prior to 2023 select N/A since this does not apply)?

Yes, No, or N/A _____

6. Are there any changes in your governing documents that you have not reported to the IRS? **Yes or No** _____

7. Is this a final return (meaning your business was closed and out of business as of December 31, 2023)? **Yes or No** _____

8. Did you get any grants? **Yes or No** _____

9. Did you pay anyone, through the business, more than \$600 over the course of the year (Do not include employees you filed a W-2 on) **Yes or No** _____

Note: If you do not already have a Profit & Loss and Balance Sheet for the year, please go fill out a Profit & Loss form, which you can get on our website. If you have a specific business that may not be listed, you can call to see if we have a more specific form for you.