

FOR RETURNING CUSTOMERS (WE PREPARED LAST YEAR'S INCOME TAXES)
Please let us know if any of the changes apply to you!

Business Name _____ Tax Year 2023

1. Was there a change in ownership? **Yes or No** _____
2. Did your business buy or sell any assets? **Yes or No** _____
(Example: Vehicles, Computers, Power Tools, Furniture, Electronics)
3. Did your business move or do you have a different mailing address than then what was used on the business's last year's return?

Yes or No _____
4. Did your business have a foreign bank account or assets? **Yes or No** _____
5. Are there any changes in your governing documents that you have not reported to the IRS? **Yes or No** _____
6. At any point in the year, has your business sold or exchanged any interest in any Virtual Currency? (Example: Bitcoin)

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 pay anyone, through the business/entity, more than \$600 over the course of the year (Do not include employees you filed a W-2 on)?

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