

Please let us know if of these apply!

Business Name _____ Tax Year 2024

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 2024 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, 2024)? **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** _____

10. How many volunteers did you have during 2024? _____

11. Did any one person, organization, or entity give you organization \$5,000 total of all contributions during 2024? _____ (if yes, we need name, address, and total amount given during the year)
12. Did your organization engage in any lobbying activities in 2024? _____
13. Did your organization engage in indirect political campaign activities on behalf of or in opposition to a candidate for public office? _____
14. Were your 2024 books/records audited by a CPA or did you use a CPA to get any audited financial statements for the tax year? _____
15. Was your main office, employees, & agents inside of the United States in 2024? _____
16. Number of voting members of the governing body for 2024? _____
17. Number of voting members that are independent for 2024? _____
18. Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee in 2024?

19. Did the organization make any significant changes to its organization documents in 2024?

20. Did the organization contemporaneously document the meetings held or written actions undertaken during 2024 by the governing body? _____
21. Does the organization have a conflict-of-interest policy? _____
- a. If yes, are officers and directors required to disclose interest that could cause conflicts? _____
 - b. Is policy regularly monitored and enforced? _____

22.Does the organization have a whistleblower policy? _____

23.Does the organization have a written document retention and destruction policy?

24.How is the 990 made available for public inspection (Circle one)

Own Website, Another's Website, Upon Request, or Other

If Other, Explain _____

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.