

## 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 booking/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.**