

Check box if **YES** or you have a question. If answer is **NO** or **N/A**, please **leave blank**.  
YES Note: The word YOU means the business, not the person completing the form.

- 1 Check: I want my return copy to be [ ] paper mailed, [ ] pdf e-mailed, or [ ] both (\$35)
- 2 [ ] Will ALL income be reported to the tax preparer, taxable or not?  
If this answer is not YES, please explain \_\_\_\_\_
- 3 [ ] If you need this return by a specific date, provide date & reason. \_\_\_\_\_
- 4 [ ] Has your telephone, fax, address, cell phone number, or e-mail address changed?
- 5 [ ] Has your name, fed id #, or state of residence changed? Date \_\_\_\_\_
- 6 [ ] If any income was earned outside Texas, do you want us to prepare a return for that city, state or country? If yes, enter each jurisdiction \_\_\_\_\_
- 7 [ ] If any income was earned in Texas, do you **NOT** want us to prepare the TX margin tax return? **Note: We will prepare this return if the box is blank.**
- 8 [ ] Has an extension been filed? If so, enter amount paid, if any \_\_\_\_\_
- 9 [ ] Did you file all required Form W-2s and 1099s by January 31, 2020?
- 10 [ ] Has IRS or a state corrected or audited a tax return since we last met?
- 11 [ ] Has the address of any owner changed since last year's return? If yes, list.
- 12 [ ] Have the ownership percentages or capital accounts changed in any way?
- 13 [ ] Have you ever declared bankruptcy or filed IRS Form 982? What year? \_\_\_\_\_
- 14 [ ] Did you operate for less than 12 months? If yes, give dates \_\_\_\_\_
- 15 [ ] Did you do any trading, belong to a barter club, or buy/sell bitcoins?
- 16 [ ] Did you have any debt refinanced, canceled, forgiven or restructured?
- 17 [ ] Do you have any investments whose statements do NOT have a US return address?
- 18 [ ] Did you borrow or loan any amount to an owner that is **NOT in writing**?
- 19 [ ] Did you borrow or loan over \$10,000 to an owner at interest rate of less than 3%?
- 20 [ ] Do you have any loans guaranteed or co-signed by owners, relatives or anyone else?
- 21 [ ] Do you rent or lease any property to owners or their businesses? They issue 1099.
- 22 [ ] Do you rent or lease any property from owners or their businesses? You issue 1099.
- 23 [ ] Did you start a new activity or invest in a partnership this year?
- 24 [ ] Did you have any owners NOT "materially participate" in the management of the business? If yes, who \_\_\_\_\_
- 25 [ ] If you own rental units, did you have any owners NOT "actively participate" in their management? If yes, who \_\_\_\_\_
- 26 [ ] Did you sell, trade, or cease using any assets listed on the depreciation sched?  
[ ] If yes, were any of those assets acquired originally from an owner?
- 27 [ ] Is the percentage of business use for any asset or vehicle less than 100%?
- 28 [ ] Did you buy, sell, exchange, repossess or foreclose any real estate?
- 29 [ ] Did you sell or trade any investments (including collectibles, coins, metals)?
- 30 [ ] Did you have any investments or loans that became worthless this year?
- 31 [ ] Did you have any casualty or theft losses?
- 32 [ ] Did you receive any non-taxable income (muni interest, insurance, damages)?
- 33 [ ] Did you pay medical insurance premiums for any 2% or more owners or relatives?
- 34 [ ] If you deduct ANY expenses for business meals, do you maintain the detailed WRITTEN information that IRS requires?
- 35 [ ] If you deduct any expenses for business vehicles or personal-use assets, do you have logbooks or other WRITTEN evidence showing the business use? If yes, please provide us a copy of one page of the log.
- 36 [ ] For charitable donations, do you have a receipt or document for EACH over \$250?
- 37 [ ] Do any owners own a more than 2% interest in any other entity (corp, K-1)?

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I have reviewed the questions answered here and the data in the accompanying worksheets and to the best of my knowledge it is true, correct, and complete. I have also read the professional services agreement printed on the back of this page and agree to its provisions.

Signature \_\_\_\_\_ Date \_\_\_\_\_

Title \_\_\_\_\_ Business Name \_\_\_\_\_