

2009 BUSINESS TAX QUESTIONNAIRE

Personal Information

Name: _____

Primary E-mail: _____

Address change? _____

Any phone number changes? _____

General Information and Questions for Tax Year 2009

Yes No

- Have you received any correspondence from the IRS that has not been brought to our attention? (If yes, submit copies of all correspondence.)
- Did you have an interest in or signature authority over a foreign financial account? (If yes, please review the [reporting rules](#) at www.irs.gov Form TD F 90-22.1.)
- Did you receive money or property from an individual, business, trust or estate located in a foreign country?
- Do you conduct business in any other state?
 - ❖ If so, have you filed the appropriate business registration and tax reports?
- Did your business participate in any barter transactions?
- Did your business issue all required 1099 forms?
- Did you or your business have any debt forgiven in 2009?
- Please review the 2008 depreciation schedule provided to you. Did you sell, convert to personal use or otherwise dispose of any of the business assets? If yes, please indicate on the schedule and return.
- Do you have the proper documentation to support your automobile deductions?
- Have you excluded the personal use of your automobile?
- Do you have the proper documentation to support business entertainment and meal deductions?
- Did you provide any employee benefits? If so, please list and indicate which employees/owners covered:
 - Benefit type/covered: _____
 - Benefit type/covered: _____
- Do you use your business cell phone primarily for business use but also for personal use? Current regulations state that all calls must be tracked and personal/business use split. Realizing how impractical this is, discussions regarding the current IRS proposals indicate that a 75% business/25% personal use split may not be challenged. Please provide us with the business portion of your cell phone expenses _____.
- Are there any changes to your business we need to be aware of (examples: change in ownership, new services, and change in entity structure?)
