

2023 Business Tax Questionnaire

Business Name: _____

Business Information

Yes	No	
<input type="checkbox"/>	<input type="checkbox"/>	Has the organization's address changed this year?
<input type="checkbox"/>	<input type="checkbox"/>	Has the address changed for any of the partners/shareholders?
<input type="checkbox"/>	<input type="checkbox"/>	Were there any changes to your organization documents? If yes, please provide a copy of new documents.
<input type="checkbox"/>	<input type="checkbox"/>	Has there been any change in ownership?
<input type="checkbox"/>	<input type="checkbox"/>	Was there a distribution of property or a transfer (by sale or death) of a shareholder interest during the tax year?
<input type="checkbox"/>	<input type="checkbox"/>	Have all bank accounts and credit card accounts been reconciled in your accounting record as of the end of the year?
<input type="checkbox"/>	<input type="checkbox"/>	Do you have an interest or signature authority over a financial account in a foreign country, such as a bank account, securities account or other financial account?
<input type="checkbox"/>	<input type="checkbox"/>	During the year did the business have any debt that was cancelled, forgiven or modified terms?
<input type="checkbox"/>	<input type="checkbox"/>	Do you have any bank loans that were obtained during the year?
<input type="checkbox"/>	<input type="checkbox"/>	Did you purchase any fixed assets (major purchases) in 2023?
<input type="checkbox"/>	<input type="checkbox"/>	Did you sell any fixed assets in 2023? Please review the depreciation schedule included in your prior year return and update any assets you no longer have.
<input type="checkbox"/>	<input type="checkbox"/>	Did you have any income from another state (other than Oklahoma)?
<input type="checkbox"/>	<input type="checkbox"/>	Did you file and/or pay sales tax to another state (other than Oklahoma)?

Form 1099's

<input type="checkbox"/>	<input type="checkbox"/>	Did the business pay \$600 or more of nonemployee compensation or labor to any individual/non-incorporated business? If yes, please provide a copy of Form 1099-NEC for each.
<input type="checkbox"/>	<input type="checkbox"/>	If you were required to file and have not, would you like our firm to prepare them for you now? (Due 1/31/2024)

Client Signature

Date

Note: You must keep records, such as receipts, canceled checks, and other documents that support an item of income, a deduction, or a credit appearing on your return.