

Submit the completed and signed Business Tax Questionnaire along with any additional tax information using one of the following methods:

- Upload your information electronically through our secure file transfer server at:  
<https://www.clientaccess.com/sharesafe/#/bwccpa>
- Mail/deliver to 15303 Huebner Road, Bldg 9, San Antonio, TX 78248. Our office now has a secure drop box for after hour drop offs.

<b>BUSINESS INFORMATION</b>
Business name: _____
Address: _____
Primary telephone: _____ Secondary telephone: _____
Primary email: _____
If we can't file your tax return by the original due date, do we have your permission to file an extension? ____ Yes ____ No
Please indicate how you would like to receive your tax return copy: ____ Secure Email ____ Printed Copy

**Please include the following information with your completed questionnaire:**

- Year-end statements for all bank accounts, business loans and/or credit cards.
- Please review the 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 to us.
- Quarterly and annual payroll reports for all four quarters: TWC reports, Form 941s, Form 940, W-2s and W-3.
- Other tax forms issued/received by your business: 1099s, 1096, 1094-B, 1098s

If you send your file via QB, email it to [cpa@neighborhoodcpa.com](mailto:cpa@neighborhoodcpa.com) and enter your QuickBooks Transfer Password: \_\_\_\_\_

<b>GENERAL BUSINESS TAX INFORMATION</b>	<b>Yes</b>	<b>No</b>	<b>COMMENTS</b>
If we prepare the individual tax returns for any members/owners of your company, have you completed the individual tax questionnaire and provided it to us? If not, please provide this before we finalize the business tax return.			
Did the business receive any tax correspondence from the IRS or a State during the past year?			
Did you have an interest in, or signature authority over a foreign financial account or have financial accounts/assets/interests maintained or issued by a foreign entity?			
Do you conduct business in any other state and/or country? List:			
Were there any ownership changes during the year? If so, please provide details and any documents supporting the changes.			
Did your business issue all required Form 1099s?			
Are you current with all payroll tax deposits?			
Did your business have any debt forgiven or file for bankruptcy?			
Do you provide any employee health insurance coverage?			
Do you provide a retirement plan to your employees?			
Do you have proper documentation to support the following deductions:			
• Automobile expenses (log)			
• Business entertainment and meals			
• Charitable contributions (signed acknowledgment letter for donations over \$250)			
• Employee meals/fringe benefits			
• Gifts (\$25 per client)			
• Travel expenses			

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