

# Business Questionnaire - 2024

NAME: \_\_\_\_\_

1) Any **changes** in contact information for the **business**? Yes \_\_\_\_\_

No \_\_\_\_\_

**Please provide any new address, email, or phone #.**

2) Any **changes** in contact information for any of the **owners**? Yes \_\_\_\_\_

No \_\_\_\_\_

**Please provide any new address, email, or phone #.**

3) Any **changes** in ownership shares or structure? Yes \_\_\_\_\_

No \_\_\_\_\_

**Please provide details.**

4) Did any of the owners make any capital contributions or loans to the company during the current year? Yes \_\_\_\_\_

No \_\_\_\_\_

**Please provide details.**

5) Did the company have any interest in, or authority over, any foreign account or foreign trust at any time during the current year? Yes \_\_\_\_\_

No \_\_\_\_\_

a) If yes, and **balance was >US\$10K**, what was the largest balance in the account during the year? \$ \_\_\_\_\_

6) At any time during 2024, did the company receive (as a reward, award, or payment) or sell, exchange, gift, or otherwise dispose of a digital asset (or any financial interest in a digital asset)? Yes \_\_\_\_\_

No \_\_\_\_\_

7) How would you like to pay any tax balances owed? Please provide a copy of a void check, **if you have not previously.** Debit \_\_\_\_\_

Check \_\_\_\_\_

8) How would you like to receive your tax return client copy? Paper \_\_\_\_\_

PDF \_\_\_\_\_

12) How would you like us to return your **original** documents to you? Pick up \_\_\_\_\_

No originals \_\_\_\_\_

Please add \$10 for postage if mailing.

Mail \_\_\_\_\_