

BUSINESS QUESTIONNAIRE - 2025

Business Name: _____

1) Are there any **changes** in contact information for the **business**?

Yes

No

If yes, please provide any new address, email, or phone #: _____

2) Are there any **changes** in contact information for any of the **owners**?

Yes

No

If yes, please provide any new address, email, or phone #: _____

3) Are there 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

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

6) At any time during 2025, 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 receive your tax return client copy?

PDF

Paper

8) If you are providing original documents, how would you like us to return them to you?

Pick up

Mail

Not Applicable