

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