

**2024**  
CORPORATE  
QUESTIONNAIRE

**REQUIRED -**  
Please complete and  
return or upload.



# CORPORATE TAX QUESTIONNAIRE

AT A MINIMUM, WE ASK THAT YOU COMPLETE THIS BRIEF TAX  
QUESTIONNAIRE AND RETURN IT TO US NO LATER THAN  
MARCH 15TH 2025 OR BE SUBJECT TO SURCHARGE.

[SmartVault Document Portal](#)

**CUSTOMER NAME:**

If any of the following items pertain to your business in 2024 please check the appropriate box and provide additional information if necessary.

YES	NO	<b>GENERAL INFORMATION</b>
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<input type="checkbox"/>	<input type="checkbox"/>	Do you have a QuickBooks or other accounting file for your business? <i>If yes, please select one below:</i> <input type="checkbox"/> QuickBooks <b>DESKTOP</b> <input type="checkbox"/> QuickBooks <b>ONLINE</b> <input type="checkbox"/> Professional Bookkeeper <input type="checkbox"/> Other: _____
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<input type="checkbox"/>	<input type="checkbox"/>	<b>QuickBooks DESKTOP Users Only:</b> Please use the instructions below to provide us necessary information. Select "Yes" if complete.
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Please provide a PDF of the **Balance sheet and Profit and Loss statement** for the tax year (2024). **IF YOU ARE A NEW CLIENT** we will also need this information for the prior tax year (2023) for comparison. *Upload this file to our secure ShareFile portal.*

*\*If your incorporation is new for 2024 you can ignore the request for prior year data.\**

[SmartVault Document Portal Link](#)

<input type="checkbox"/>	<input type="checkbox"/>	<b>QuickBooks ONLINE Customers or Users ONLY:</b> Have you invited us as your accountant to your QuickBooks Online account?
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*If no, please follow the instructions below:*

1. From the home screen, click on the **Gear** icon in the top right corner and select **Manage Users**
2. Go to the **Accounting Firms** tab
3. Enter your tax consultant's email address and click the **Invite** button

<input type="checkbox"/>	<input type="checkbox"/>	Do you need a paper copy of your tax return? <i>If yes, additional processing &amp; handling fees will apply to your return.</i>
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YES	NO	<b>ASSET INFORMATION</b> <i>If yes, provide details or copies of the documentation listed below.</i>
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<input type="checkbox"/>	<input type="checkbox"/>	Do you have business bank accounts? <i>Provide copies of the December statements for all accounts.</i>
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<input type="checkbox"/>	<input type="checkbox"/>	Do any customers owe you money? <i>Provide an updated list of amounts owed to you (accounts receivable summary).</i>
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<input type="checkbox"/>	<input type="checkbox"/>	If yes, is any of this money uncollectible (i.e., bad debts)? <i>Notate which accounts receivable need to be written off.</i>
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<input type="checkbox"/>	<input type="checkbox"/>	Do you have inventory? <i>Provide an accurate count or listing.</i>
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<input type="checkbox"/>	<input type="checkbox"/>	Did you purchase any business assets for more than \$2,500 each? <i>Provide copies of all purchase receipts.</i>
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<input type="checkbox"/>	<input type="checkbox"/>	Did you dispose of any business assets? <i>Provide a list of assets that are no longer in service.</i>
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<input type="checkbox"/>	<input type="checkbox"/>	Did you purchase or sell any real estate? <i>Provide copies of all closing statements.</i>
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YES	NO	<b>LIABILITY INFORMATION</b> <i>If yes, provide details or copies of the documentation listed below.</i>
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<input type="checkbox"/>	<input type="checkbox"/>	Do you owe any vendors money? <i>Provide an updated list of amounts you owe (accounts payable summary).</i>
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<input type="checkbox"/>	<input type="checkbox"/>	Do you have any business loans? <i>Provide copies of the December statements for all loans.</i>
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<input type="checkbox"/>	<input type="checkbox"/>	Do you have any business credit cards? <i>Provide copies of the statements showing activity through December 31 (usually the statements due in January or February for all accounts).</i>
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<input type="checkbox"/>	<input type="checkbox"/>	Do you file and pay sales tax? <i>Provide copies of the December sales tax returns (prepared and filed in January).</i>
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<input type="checkbox"/>	<input type="checkbox"/>	Do you have payroll? <i>Provide copies of the Forms W-2, W-3, A-1, 940, 941 and state unemployment returns (if we prepare your payroll, no copies are necessary).</i>
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<input type="checkbox"/>	<input type="checkbox"/>	Do you have any related party debt? <i>Provide a copy of the agreement or the amortization schedule.</i>
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**CUSTOMER NAME:**

**YES NO EQUITY INFORMATION** *If yes, provide details or copies of the documentation listed below.*

- As the business owner, did you personally contribute or withdraw money from the business? *Provide details of money contributed and withdrawn (separate by owner).*
- Were there any ownership changes during the year? *Provide updated ownership percentages.*

**YES NO INCOME & EXPENSE INFORMATION** *If yes, provide details or copies of the documentation listed below.*

- Did you receive any Forms 1099? *Provide copies for our files.*
- Did you pay anyone \$600 or more for rent, services (including parts and materials), prizes and awards, or other income? *Provide copies of any Forms 1099 that you issued for our files.*
- Did you pay rent? *If your lease agreement has been updated, provide a copy of your new rental agreement.*
- Did you pay insurance (including general liability, life, health, etc.)? *Provide details of the amounts paid.*
- Did you make any charitable contributions? *Provide copies of any giving statements that you received from the charitable organizations.*
- Did you make any major repairs and maintenance expenditures? *Provide details of the amounts paid.*
- Did you use a personal vehicle for non-commuting business purposes? *Provide the total business mileage driven during 2024 below.*

*I hereby certify that in 2024 I drove \_\_\_\_\_ miles for business purposes and have the written records to support a tax deduction.*

**Shareholder's / Officer's Information**

Name

Address

Social Sec. # or FEIN

% Owned

**CUSTOMER NAME:**

**Natural Disaster – Business Loss**

Did you incur an unreimbursed loss (*a loss in excess of insurance or FEMA reimbursement*) in a federally declared disaster area?

*If yes above, please complete this table and provide supporting records.*

	Property A	Property B	Property C
Description of property			
City, State, Zip			
Date acquired			
Cost of property			
Date of loss			
Description of loss			
Was insurance claim made?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Received FEMA assistance?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Fair market value <u>BEFORE</u> loss			
Fair market value <u>AFTER</u> loss			
Total out of pocket expenses			

Additional Details (optional):


Thank you for completing the Business Questionnaire for Tax Year 2024  
**Please upload this completed questionnaire as well as any supporting documentation to your secure SmartVault account as soon as possible to ensure timely delivery of your tax return.**  
 Questions? Email [roberthalltaxes@Roberthalltaxes.com](mailto:roberthalltaxes@Roberthalltaxes.com) or call 818-242-4888

Client's Name:	<b>2024</b>
Business Name:	
FEIN:	

# STATEMENT C

## Corporate Organizer

Business Address:		Business Activity (including Product or Service)			
City, State, Zip		Accounting Method	Cash	Accrual	Other
Fiscal year: <b>From:</b> _____ <b>To:</b> _____		Inventory Method	Cost	Lower C/M	Other
Gross Receipts / Total Income		Legal & Professional Fees			
Returns & Allowances		Licenses & Permits			
Beginning Inventory		Meals			
Purchases		Office Expense			
Cost of Items for Personal Use		Outside Services			
Cost of Labor		Parking & Tolls			
Materials & Supplies		Pension & Profit Sharing Plans			
Other Costs		Postage			
Ending Inventory		Printing			
Accounting		Refuse Disposal			
Advertising		Rent- Machinery / Equipment			
Amortization (Bring Schedule)		Rent - Other Business Property			
Answering Service		Repairs			
Bad Debt		Security & Safety			
Bank Service Charge		Storage			
Car & Truck Expenses		Supplies			
Collection Expense		Taxes - Business			
Commissions		Taxes - Payroll			
Delivery / Freight		Taxes - Property			
Depreciation (Bring Schedule)		Taxes - Other			
Dues / Publications		Telephone			
Education Expense		Theft/Casualty			
Employee Benefit Programs		Tools			
Gifts		Travel - Airfare			
Guaranteed Payments		Travel - Lodging			
Insurance - Auto		Travel - Meals			
Insurance - Other		Travel - Other			
Interest - Auto		Uniforms			
Interest - Mortgage		Utilities			
Interest - Other		Wages & Salaries			
Janitorial Service		Other (Please List):			
Laundry & Cleaning					
Lease - Equipment					
Lease - Auto					

\*As of 1/1/2018 entertainment is no longer deductible