

2023

**PARTNERSHIP/LLC
QUESTIONNAIRE**



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

PARTNERSHIP / LLC TAX QUESTIONNAIRE

AT A MINIMUM, WE ASK THAT YOU COMPLETE THIS BRIEF TAX
QUESTIONNAIRE AND RETURN IT TO US NO LATER THAN
MARCH 15TH 2024 OR BE SUBJECT TO SURCHARGE.



[SmartVault Document Portal](#)

CUSTOMER NAME:

If any of the following items pertain to your business in 2023 please check the appropriate box and provide additional information if necessary.

YES	NO	GENERAL INFORMATION
<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 DESKTOP <input type="checkbox"/> QuickBooks ONLINE <input type="checkbox"/> Professional Bookkeeper <input type="checkbox"/> Other: _____
<input type="checkbox"/>	<input type="checkbox"/>	QuickBooks DESKTOP Users Only: Please use the instructions below to provide us necessary information. Select "Yes" if complete. Please provide a PDF of the Balance sheet and Profit and Loss statement for the tax year (2023). IF YOU ARE A NEW CLIENT we will also need this information for the prior tax year (2021) for comparison. Upload this file to our secure ShareFile portal. <i>*If your Partnership / LLC is new for 2023 you can ignore the request for prior year data.*</i> SmartVault Document Portal
<input type="checkbox"/>	<input type="checkbox"/>	QuickBooks ONLINE Customers or Users ONLY: Have you invited us as your accountant to your QuickBooks Online account? <i>If no, please follow the instructions below:</i> 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 the following email address (Roberthalltaxes@roberthalltaxes.com) 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 & handling fees will apply to your return.</i>

YES	NO	ASSET INFORMATION <i>If yes, provide details or copies of the documentation listed below.</i>
<input type="checkbox"/>	<input type="checkbox"/>	Do you have business bank accounts? <i>Provide copies of the December statements for all accounts.</i>
<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>
<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>
<input type="checkbox"/>	<input type="checkbox"/>	Do you have inventory? <i>Provide an accurate count or listing.</i>
<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>
<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>
<input type="checkbox"/>	<input type="checkbox"/>	Did you purchase or sell any real estate? <i>Provide copies of all closing statements.</i>

YES	NO	LIABILITY INFORMATION <i>If yes, provide details or copies of the documentation listed below.</i>
<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>
<input type="checkbox"/>	<input type="checkbox"/>	Do you have any business loans? <i>Provide copies of the December statements for all loans.</i>
<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>
<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>
<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>
<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>

CUSTOMER NAME:		
YES	NO	EQUITY INFORMATION <i>If <u>yes</u>, provide details or copies of the documentation listed below.</i>
<input type="checkbox"/>	<input type="checkbox"/>	As the business owner, did you personally contribute or withdraw money from the business? <i>Provide details of money contributed and withdrawn (separate by owner).</i>
<input type="checkbox"/>	<input type="checkbox"/>	Were there any ownership changes during the year? <i>Provide updated ownership percentages.</i>
YES	NO	INCOME & EXPENSE INFORMATION <i>If <u>yes</u>, provide details or copies of the documentation listed below.</i>
<input type="checkbox"/>	<input type="checkbox"/>	Did you receive any Forms 1099? <i>Provide copies for our files.</i>
<input type="checkbox"/>	<input type="checkbox"/>	Did you pay anyone \$600 or more for rent, services (including parts and materials), prizes and awards, or other income? <i>Provide copies of any Forms 1099 that you issued for our files.</i>
<input type="checkbox"/>	<input type="checkbox"/>	Did you pay rent? <i>If your lease agreement has been updated, provide a copy of your new rental agreement.</i>
<input type="checkbox"/>	<input type="checkbox"/>	Did you pay insurance (including general liability, life, health, etc.)? <i>Provide details of the amounts paid.</i>
<input type="checkbox"/>	<input type="checkbox"/>	Did you make any charitable contributions? <i>Provide copies of any giving statements that you received from the charitable organizations.</i>
<input type="checkbox"/>	<input type="checkbox"/>	Did you make any major repairs and maintenance expenditures? <i>Provide details of the amounts paid.</i>
<input type="checkbox"/>	<input type="checkbox"/>	Did you use a personal vehicle for <u>non-commuting</u> business purposes? <i>Provide the total business mileage driven during 2023 below.</i>
<i>I hereby certify that in 2023 I drove _____ miles for business purposes and have the written records to support a tax deduction.</i>		
YES	NO	CORONAVIRUS AID, RELIEF & ECONOMIC SECURITY ACT (CARES ACT)
<u>COVID-19</u>		
<input type="checkbox"/>	<input type="checkbox"/>	Did you receive a standard Economic Injury Disaster Loan (EIDL) to be repaid over a 30-year term?
<input type="checkbox"/>	<input type="checkbox"/>	Did you receive an EIDL grant (\$1k grant per employee up to a maximum of \$10k)?
<input type="checkbox"/>	<input type="checkbox"/>	Did you receive a Paycheck Protection Program (PPP) loan?
<input type="checkbox"/>	<input type="checkbox"/>	Was all or a portion of your PPP loan forgiven in 2023?
<input type="checkbox"/>	<input type="checkbox"/>	Did you elect to defer the employer portion of Social Security tax (03/27/23 – 12/31/23)?
<input type="checkbox"/>	<input type="checkbox"/>	Did you elect to defer the employee portion of Social Security tax (09/01/23 – 12/31/23)?
<input type="checkbox"/>	<input type="checkbox"/>	Did you have to fully or partially suspend operations due to a coronavirus shutdown order?
<input type="checkbox"/>	<input type="checkbox"/>	Did your business decline by more than 50% (compared to the same calendar quarter last year)?
<input type="checkbox"/>	<input type="checkbox"/>	Did you provide paid sick leave or paid family and medical leave to any employees due to COVID during 2023?
<u>If you answered YES to any of the questions above, please provide related documentation.</u>		

Partnership Partners' Information

Partner's Name

Partner's Address

Social Sec. # or FEIN

P&L % / % 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			

Partners Other Information - Please Identify	Partner 1	Partner 2	Partner 3	Partner 4
Capital contributed by partner				
Loans made to the partnership				
Loan made to the partner				
Guaranteed Payments made to the partner				

Additional Details (optional):

Thank you for completing the Business Questionnaire for Tax Year 2023.

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 or call 818-242-4888

