

Business Tax Year Questionnaire

YES I acknowledge that it is my responsibility to provide Next Step Tax LLC with all relevant documents to prepare my tax return. I will upload them into my BOX account and will notify Next Step Tax once all documents are uploaded.

I would like Next Step Tax to assist me and my business with the following:

Describe any significant business events that occurred in the tax year.

IN THE 2021 TAX YEAR, DID YOUR BUSINESS HAVE / OR:

- | YES | NO | An | LLC | DBA | S-Corp | Partnership |
|-----|----|--|-----|-----|--------|-------------|
| | | Name: _____ | | | | |
| YES | NO | Own, Buy or Sell a vehicle? Include purchase or sales documents. Own, | | | | |
| YES | NO | Buy or Sell Property? Include associated expenses and Hud-1. | | | | |
| YES | NO | Business insurance including Errors and Omissions \$ _____ | | | | |
| YES | NO | Operate and receive income from another state? States _____, _____, _____, _____ | | | | |
| YES | NO | Continuing Education, training, or licensing fees? \$ _____ | | | | |
| YES | NO | Annual fees or subscriptions (MLS, ABoR)? \$ _____ | | | | |
| YES | NO | Insurance and/or office fees? \$ _____ | | | | |
| YES | NO | Make estimated tax payments? \$ _____ | | | | |
| YES | NO | Marketing expenses? (website, biz cards, flyers) \$ _____ | | | | |
| YES | NO | Business travel (airfare and hotels)? \$ _____ | | | | |
| YES | NO | Meals with clients or for the office? \$ _____ | | | | |
| YES | NO | Home Office? Sq Ft of office _____ / Sq Ft of home _____ = _____ % | | | | |
| YES | NO | Home property tax? \$ _____, Insurance \$ _____, Internet \$ _____, | | | | |
| YES | NO | Cell Phone? \$ _____, Utilities \$ _____, Maintenance \$ _____ | | | | |
| YES | NO | Medical/Dental/Vision insurance premiums for self only? \$ _____ | | | | |

YES NO Office supplies? \$_____

YES NO Vehicle mileage? Total miles_____, business miles_____

A YES answer means I agree to upload the appropriate document(s) into my BOX account so my business tax return is accurate and complete.