



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.

Name of Business:

Is Business a Schedule C S-Corp Partnership Corporation

Type of Business:

Date Incorporated:

EIN Number:

Business Address:

Owner Name:

Ph#:

EMAIL:

Tx Comptroller XT or FQ #:

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

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.

YES NO Own, Buy or Sell a vehicle? Include purchase or sales documents.

YES NO Own, Buy or Sell Property? Include Closing Statement.

YES NO Make payments that would require you to issue a 1099-NEC or MISC?

YES NO Operate and receive income from another state? States _____, _____, _____, _____

YES NO Have any employees? #

YES NO Maintain a balance sheet?

YES NO Do you have expenses? Include a P&L or Expenses spreadsheet

YES NO Make estimated tax payments? \$ _____

YES NO Home Office? Sq ft of office _____ / Sq ft of home _____ = _____%

YES NO Track business miles? Total miles: Business Miles:

YES NO If you have an S-Corp or Partnership, upload formation documents: Sec of State Certificate and Original Document, Form 2553 (S-Corp), IRS EIN#

YES NO Did you receive a 1099-K for Third Party Transactions (Venmo, Square, Etc.,?)