2013 Business Tax Questionnaire

INSTRUCTIONS:

It is extremely important that you thoroughly complete this questionnaire and return it to us as it is designed to identify potential tax savings and to create a complete and accurate tax return. Recently the IRS has increased its audit activity so it is even more imperative that we receive accurate information.

Submit the **completed** and **signed** 2013 Business Tax Questionnaire along with any additional tax information one of the following three ways:

- Upload your information electronically through our **NEW** secure system, CPA SafeMail. If you do not already have a link, please e-mail Cassy@KevinShawCPA.com.
- Fax to 970-223-6509
- Mail/Deliver to 1044 West Drake Road, Suite 201, Fort Collins, CO 80526.

CONTACT INFORMATION (Please complete even if you have provided us the same information in the past):

BUSINESS NAME: ______________________ PRIMARY PHONE: ______________
ADDRESS: ______________________ CELL PHONE: ______________
CITY/STATE/ZIP: ______________________
PRIMARY CONTACT: ______________________ TITLE: ______________
EMAIL: ______________________ FAX: ______________

Please indicate your preferred method of contact (email, phone, etc.): ______________

Please provide the e-mail address for your paperless bill: ______________

_____ Check here to OPT OUT of paperless billing

Please indicate how you would like to receive your tax return:

_____ **Secure Email**
_____ **Printed Copy**

Please include with the completed questionnaire the following:

_____ Accountants Copy of your QuickBooks file with a 1/1/14 dividing date (or first day of your new fiscal year) with bank, credit card, and loan accounts reconciled.
_____ If your records are in a different accounting software, please provide a two-year comparative Balance Sheet and two-year comparative Profit & Loss Statement.
_____ If you do not use an accounting software program, please provide a summary of all 2013 business transactions (Excel format preferred).
_____ Year-end statements for any bank accounts, business loans and/or credit cards.
_____ Signed Shaw & Associates Representation Letter (visit www.KevinShawCPA.com, Resources, Client Forms)

If you send your file via Intuit, email it to Cassy@KevinShawCPA.com and enter your QuickBooks Transfer Password: ______________(this password is specifically created when you transfer the file and may not be the same as your regular file password)

Also please provide your Admin QuickBooks file password: ______________

NEW CLIENTS ONLY – Please include the following, if not already provided to us:

____ Prior year tax return (federal and state)
____ Prior year depreciation schedules (you may need to contact your previous tax preparer)
____ Articles of incorporation/organization, by laws, and/or operating agreement
____ FEIN: ______________ State Account Number: ______________
____ IRS acceptance letter of S-corporation status, if applicable

Please answer each question. If a question is not answered, we will assume it is not applicable to your current situation. If you are unsure, please note your questions in the comments. If any of this information is accounted for in your books of record, you do not need to provide us with the information twice. Please note "in books" in the space provided.

This questionnaire is for use in preparing your business income tax return. There are many other taxes and regulations that impact your business that you need to be aware of, such as payroll taxes (941, 940, etc.), sales and use taxes, property taxes, etc. Please visit www.KevinShawCPA.com, Resources, Helpful Instructions to access our annual business checkup for more information. If you have any questions, please contact us.

	General Business Tax Information	**YES**	**NO**	**COMMENTS**
1	If we prepare the individual tax returns for any members/owners, have you completed the individual tax questionnaire and provided it to us? If not, please provide this before we finalize the business tax return. There are many instances when information affects both business and individual tax returns; in order to make the best tax decisions, it is important that we have all information for the business and individual tax returns.			
2	Did the business receive any notices from the IRS or the State during the past year regarding taxes? **(Please provide a copy if you have not already sent one to us).**			
3	Were there any ownership changes during the year? If so, please provide dates of changes; names, addresses, and social security numbers of new owners; new ownership percentages; and any legal documents supporting this change.			
4	Did the business purchase any fixed assets in 2013? If yes, please provide details including description, purchase date, and purchase amount **(if not already detailed in your books).**			
5	Does the business have a retirement plan (401(k), solo 401(k), SEP, Simple IRA, etc.)?			
5a	-If yes, has the owner made any current year contributions on behalf of him/herself?			
5b	-If yes, will there be any additional contributions before the tax return is filed? If so, how much?			
5c	-If no, does the business owner want to create a plan before the tax return is filed?			
6	Did the business owner use personal funds to pay for any business items in 2013 **that are not detailed in your books**?			
6a	-If so, please include a summary by expense category. If information does not fit in the space provided, please submit separately.			
7	Does the business owner have health insurance for the owner and/or owner's family that is not covered under a group plan at a different place of employment? This could also be dental, vision, Medicare, Medigap, and/or Cobra.			
7a	-If so, please provide the total paid in 2013 for the business owner and family. **(If not already detailed separately in your books).**			
8	Did the business have any foreign income, foreign bank accounts, other foreign assets, or other foreign financial activity at any time during the year?			
9	Did the business make any payments that would require it to file 1099 Form(s) (1099-MISC, 1099-INT, etc.)? **If you are unsure of the requirements, please contact us.**			
9a	-If so, did the business file all required 1099 Form(s)?			

Please answer each question. If a question is not answered, we will assume it is not applicable to your current situation. If you are unsure, please note your questions in the comments. If any of this information is accounted for in your books of record, you do not need to provide us with the information twice. Please note "in books" in the space provided.

	General Business Tax Information (continued)	YES	NO	COMMENTS
10	Does the business own rental property?			
10a	-If yes, was there any personal use of any rental property? If so, provide the following information for each rental property that was used for personal use. **If you have more than one rental property, please copy this page and complete for additional rental properties.**			
10b	-Total number of personal use days (do not include repair days listed below)			
10c	-Total number of repair days (any day you spent working substantially full time repairing and maintaining the rental property)			
10d	-Total number of days rented			
10e	-Total number of days vacant			
11	Does the business owner or designee want to review the tax return before it is e-filed?			
12	How do you want K-1s delivered to each member/shareholder?			
	-Secured email to main contact to distribute			
	-Hard copy to main contact to distribute			
	-Secured email to each member/shareholder			
	-Mailed paper copy to each member/shareholder			

If any of this information is accounted for in your books of record, you do not need to provide us with the information twice. Please note "recorded in books" in the space provided.

Business Vehicle Information - The IRS is beginning to enforce more stringently their requirements for detailed mileage records that support business use of vehicles. It is the responsibility of the business owner to have these records available upon the request of the IRS. **You cannot use estimates of mileage or business use. Because of IRS preparer penalties we are unable to estimate or calculate mileage for you.** While we do not require that you provide us with these detailed records, it is imperative that you have them. **If you have more than two vehicles used for business, please copy this page and complete for additional vehicles.** Please summarize your actual business vehicle use below:

- Vehicle 1:	
Year, Make, Model	
Total Business Miles for January 1, 2013 – December 31, 2013	
Total 2013 Miles (Business and Personal Combined)	
If you use the standard mileage rate on a vehicle, you can skip this item for that vehicle. **If not already in your books**, list additional 2013 expenses (licenses, gas, oil, lease payments, insurance, registration fees, repairs, tires, etc.). If information does not fit in the space provided, please submit separately.	
- Vehicle 2:	
Year, Make, Model	
Total Business Miles for January 1, 2013 – December 31, 2013	
Total 2013 Miles (Business and Personal Combined)	
If you use the standard mileage rate on a vehicle, you can skip this item for that vehicle. **If not already in your books**, list additional 2013 expenses (licenses, gas, oil, lease payments, insurance, registration fees, repairs, tires, etc.). If information does not fit in the space provided, please submit separately.	

SHAW & ASSOCIATES
CPAs & FINANCIAL ADVISORS

If any of this information is accounted for in your books of record, you do not need to provide us with the information twice. Please note "recorded in books" in the space provided.

Home Office Information: If the business owner has a **qualified** home office, please complete the following (include the total amount of each expense; we will calculate the home office portion):	
If you would prefer to use the new IRS standard home office deduction of $5/square foot, indicate so in the box at the right and do not complete the remainder of the home office information below.	
2013 Mortgage Interest	
2013 Property Taxes	
2013 Utility Costs (Electric, Gas, Water, Sewer, Trash)	
2013 Property Insurance Costs	
2013 Maintenance Expenses	
2013 Repairs	
2013 HOA Fees	
2013 Capital Improvements and/or Appliances (include description, date, and amount)	
2013 Other Home Office Expenses:	
If we have not deducted a home office for you in the past or if you have changed home office square footage please provide the following:	
-Date home office first used.	
-Square footage of the space used solely for business.	
-Total finished square footage of the home, not including unfinished basements and garages.	
-If this is a new home office, purchase price of home plus cost of major improvements.	

The information above for preparation of my (our) tax return is complete and correct to the best of my (our) knowledge and belief. I (we) have adequate records to support the above information.

__________________________ ____________
Signature Date

Submitting this completed questionnaire electronically constitutes my (our) signatures.

__________________________ ____________
Signature Date

Shaw & Associates provides a full range of business services to our clients. Please indicate below if you need assistance in any areas in the coming year. This is optional and not required for the preparation of your tax return.

	YES	NO	COMMENTS
TAX SERVICES:			
Tax Planning and Consultation –Minimize tax liability and make the most of available tax deductions throughout the year.			
IRS Representation –Assistance with IRS, and State Tax Notices, and past IRS debt.			
Business Retirement Plan for owners and employees.			
FINANCIAL SERVICES (offered in conjunction with John Selzer and Capital Point Financial Group):			
Personal Retirement Plans – IRAs, SEP IRAs, Roth IRAs, 401(k)			
Investment Review and Analysis – Develop strategies to address volatility and accomplish long term goals.			
Insurance Review			
ACCOUNTING & BOOKKEEPING SERVICES:			
Business Consulting – Profitability and/or Cash Flow Analysis, Inventory			
Financial Statement Preparation			
Assistance Obtaining Business Financing, Loan Application			
Training – QuickBooks, Payroll, or other Bookkeeping Training			
As a QuickBooks ProAdvisor, we can offer you a discount on your software. Would you like to purchase QuickBooks or upgrade your version?			
Payroll Assistance – Quarterly Payroll Tax Filings			
Payroll Assistance – Ongoing Payroll Preparation			
W-2 Preparation or 1099 Preparation (please specify in comments)			
Sales Tax Filing			
Monthly, Quarterly, or Year-End File Reviews/Clean Up			
Other – please specify in comments			