

2019 Partnership Tax Questionnaire

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Business' Legal Name	Federal EIN
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Prior Clients: Please fill in any changes below

New Clients: Please fill out entirely

Partner:		SS#	
Percent Owned	Email		Employee?
Different percent for profit/loss?	Date of birth	Do we prepare their personal taxes? Yes No	
Address	City	Sate	Zip
County	Home phone	Work or Cell	

What is this partner's guaranteed payments for 2019 in the partnership agreement?

Partner:		SS#	
Percent Owned	Email		Employee?
Different percent for profit/loss?	Date of birth	Do we prepare their personal taxes? Yes No	
Address	City	Sate	Zip
County	Home phone	Work or Cell	

What is this partner's guaranteed payments for 2019 in the partnership agreement?

ATTACH LIST FOR ADDITIONAL SHAREHOLDERS

Financial Statements

Type of Financial Statement	<i>Attached</i>	<i>Books by CCTAX</i>	<i>Please create one for me (needed info attached) Describe attachment</i>
Profit/Loss (Income Statement)			
Balance Sheet			
Statement of Shareholder's Equity			
Shareholder's Distribution Statement			

Did the company provide health insurance to shareholders? Yes No Does the company offer retirement benefits? Yes No

Did you make any payments that require a 1099-MISC (\$600 or more to one person during the year) Yes No

If yes, did you already file 1099-MISC forms? Yes No Do you want us to prepare and file 1099's for you? Yes No (if yes, complete)

<i>Full Name/Business Name</i>	<i>Social Security # or EIN</i>	<i>Mailing Address</i>	<i>Amount Paid</i>

Did you buy or sell any depreciable assets during the year? Yes No

Purchases of \$2500 or more on one item or one invoice are usually depreciable and should be listed here. If you are a new client be sure to attach a copy of your depreciation schedule from last year regardless of purchases/sales this year.

<i>Description of Asset</i>	<i>Purchase Date</i>	<i>Amount Paid</i>	<i>Additional Info</i>