



Business Name: _____

EIN: _____

Tax Year: _____

Business Tax Questionnaire

For preparation of **1120, 1120(s), and 1065** returns please provide the following:

Profit and Loss Statement for the tax year

Balance Sheet for the tax year

Prior year's tax return with ALL schedules

and attachments included - **Example: If we are preparing 2007, please send your 2006 return**

For preparation of **940, 944, and 941's** returns please provide the following:

The payroll reports

W-2's and W-3's filed

If we are only preparing 940's please provide us with each 941 return (each quarter) for that tax year

Please fax, mail or email your information and this checklist to your Tax Analyst.

If you are **mailing documents** to your Tax Specialist, please do not send original copies! Please mail your documents to the following address:

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