



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 will 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:

PartnerName  
Tax Defense Network Affiliated Partner  
PartnerAddress  
PartnerCity, PARTNERSTATE PARTNERZIPCODE  
Phone: PARTNERPHONE  
Fax: PARTNERFAX

Email: PartnerEmail