

2025 Tax Questions for Businesses

This questionnaire only applies if you had a business or rental property in 2025. If you did not, then you do not need to fill this out. If you did, please complete this form for each of your businesses, check the appropriate box, and include all necessary details and documentation for all items applicable to your business for 2025.

Business Name: _____

General Business Information

Yes No

Do you use the desktop version of QuickBooks? If so, please provide a copy of the file.

☐ ☐

If yes, please provide the version year: _____

If yes, please provide the password: _____

Did the business have a change to its operating agreement or bylaws this year?

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If yes, please provide a copy of the revised agreement or amendment.

Were there any ownership changes during the year?

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If yes, please provide a schedule of all changes which should include the new owners name, address, identification number (SSN or EIN), entity type, date of change, and number of shares or percentage of ownership. If was a transfer from an existing owner to a new owner then also include who the ownership was transferred from.

Did the business have income earned in any other state or city other than the business' location this year?

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If yes, please provide a schedule of the amount of sales and activity in each location.

Did the business have employees located and working in any other state or city other than the business' location this year?

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If yes, please provide a schedule of the amount of wages and activity in each location.

Purchases, Sales, and Debt Information

Did you start a new business, purchase real estate, or acquire a new interest in a partnership or S corporation during the year?

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If yes, explain: _____

Did the business sell, exchange, or purchase any assets used in your trade or business?

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If yes, explain: _____

Did you sell an existing business or real estate used for the business this year?

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If yes, explain: _____

Did the business make any sales on an installment method basis?

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If yes, please provide a copy of the agreement, a schedule of payments received this year, and the contract balance at the beginning of this year.

Did the business have any sales or exchanges of digital assets?

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Did the business take out a new loan this year or refinance an existing loan?

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Did the business have any debt canceled or forgiven this year?

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Income and Expense Information

Did the business receive (as a reward or payment) any digital assets?

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Did you use any personal funds to pay for any business items this year that are not currently recorded in the books you provided?

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If yes, please provide a schedule with descriptions and amounts.

Did you use a vehicle for business purposes this year?

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If yes to first question, was it used exclusively for business or was there also personal use?

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If yes to first question, do you have documentation for the business mileage or business use of the vehicle?

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If yes to first question, do you have written documentation?	<input type="checkbox"/>	<input type="checkbox"/>
If yes to first question, are auto expenses currently included in the books provided?	<input type="checkbox"/>	<input type="checkbox"/>
Did you utilize an area of your home exclusively for business purposes?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, please provide total sq ft and sq ft for business use: _____		
If yes to first question, are home expenses currently included in the books provided?	<input type="checkbox"/>	<input type="checkbox"/>
Do you expect a large fluctuation in income or deductions next year?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, explain: _____		

Retirement and Health Care Information

Did the business have a retirement plan?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, circle what type: SIMPLE SEP 401k Other _____		
If yes, does the business make a contribution for the employee(s) in addition to the owner(s)?	<input type="checkbox"/>	<input type="checkbox"/>
Did the owner(s) have self-employed health insurance for the owner and/or owner's family?	<input type="checkbox"/>	<input type="checkbox"/>
Self-employed health insurance includes amounts paid by the business or from personal funds. It does not include payments made through other employers' plans (such as spouse).		

Miscellaneous Information

Total number of Forms W-2 filed by this entity: _____

Did the business pay any partnership, LLC, sole proprietors, or other non-corporate businesses \$600 or more for any rentals or service (ex. repairs, janitorial, IT services, legal fees, other professional fees, independent contractors, etc)?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, did you prepare Form 1099-NEC and/or Form 1099-MISC?	<input type="checkbox"/>	<input type="checkbox"/>
If yes but you did not prepare the forms, would you like Seibel & Katz CPAs to prepare them (additional fees apply)? If so, please see our website for information we would need to prepare them or contact your tax preparer. We need the information by January 15, 2026 or the 1099s may not be filed timely.	<input type="checkbox"/>	<input type="checkbox"/>
Did the business pay at least \$10 of dividends or interest?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, did you prepare Form 1099-DIV and/or 1099-INT?	<input type="checkbox"/>	<input type="checkbox"/>
If yes but you did not prepare the forms, would you like Seibel & Katz CPAs to prepare them (additional fees apply)? If so, please see our website for information we would need to prepare them or contact your tax preparer. We need the information by January 15, 2026 or the 1099s may not be filed timely.	<input type="checkbox"/>	<input type="checkbox"/>
Did the business have a financial interest in or a signature authority over a financial account such as a bank account, securities account, or brokerage account, located in a foreign country?	<input type="checkbox"/>	<input type="checkbox"/>
Do the business have any foreign financial accounts, foreign financial assets, or hold interest in a foreign entity?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive correspondence from any IRS, state, or city tax authority?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, provide copies if haven't already or explain: _____		

Other information we should know: