

# BUSINESS TAX QUESTIONNAIRE

COMPANY NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP \_\_\_\_\_

TELEPHONE NUMBER (    ) \_\_\_\_\_ - \_\_\_\_\_

E-MAIL ADDRESS \_\_\_\_\_

WEBSITE \_\_\_\_\_

(IF INCORPORATED)

PRESIDENT: \_\_\_\_\_

VICE PRESIDENT: \_\_\_\_\_

SECRETARY: \_\_\_\_\_

TREASURER: \_\_\_\_\_

## QUESTIONS FOR CURRENT TAX YEAR

(Note: If any unincorporated business/individual receives \$600 or more in a year, 1099 forms are required)

Were 1099 forms required to be printed for current tax year? Yes/No (circle one)

If yes – were 1099 forms printed? Yes/No (circle one)

**NEO ACCOUNTING & TAX SERVICES LLC**

1378 PEARL RD.  
BRUNSWICK, OHIO 44212



23811 CHAGRIN BLVD. STE. LL60  
BEACHWOOD, OHIO 44122

# **AUTOMOBILE SECTION**

**IMPORTANT: WE MUST HAVE THIS INFORMATION FILLED OUT IF YOU WISH TO DEDUCT ANY AUTOMOBILE EXPENSES. EXPENSES PAID BY THE BUSINESS THAT IS NOT SUBSTANTIATED WILL BE TREATED AS PERSONAL INCOME.**

	<b>Example</b>	<b>Vehicle # 1</b>	<b>Vehicle # 2</b>	<b>Vehicle # 3</b>	<b>Vehicle # 4</b>
Vehicle Description	2007 Ford Expedition				
Date Acquired	6/6/2007				
Purchase Price	\$29,602.00				
Leased Vehicles:					
Fair Market Value	\$29,602.00				
Miles 1/1 to 12/31 Total Miles Driven	10,205				
Business Miles 1/1 to 12/31 Total Business Miles	20.904				
Total Commuting:					
Home to Work & Back	1,343				
Total other personal miles	2,008				
Was the vehicle available for personal use?	Yes				
Is another vehicle available for personal use	Yes				
Was the vehicle primarily used by an officer/owner owning 1% or more of the business?	Yes				
Is the Gross Vehicle Weight over 6000 lbs?	Yes				

**Please Circle Answer**

Do you have evidence for the above property to support the business use claimed?	Yes / No
Is the evidence written?	Yes / No
Do you maintain a written policy statement that prohibits all personal use of the vehicles including commuting, by your employees?	Yes / No
Do you provide more than five vehicles to your employees, or treat all use of vehicles by employees as personal use?	Yes / No

To the best of my knowledge and belief the above information is true, correct and complete.

\_\_\_\_\_  
Signature & Title

\_\_\_\_\_  
Date



**(5) MAJOR EQUIPMENT SOLD:** (List all major equipment sold during the year)

<u>Date Sold</u>	<u>Item Sold</u>	<u>Selling Price</u>	<u>Date Acquired</u>	<u>Acquisition Cost</u>

**(6) NOTES & CONTRACTS PAYABLE:** (List all Installment or Debts other than Accounts Payable owed at year end. Attach copies of all original loan documents for any new loans during the year)

<u>To Whom Owed</u>	<u>Reason for Debt</u>	<u>Balanced owed @ Year End</u>

**(7) SHAREHOLDER OFFICER LOANS:** (Please list any loans made from shareholders during the year)

<u>Date of the Loan</u>	<u>Amount Loaned</u>	<u>Deposited in Business Accounts?</u>

**(8) OWNER'S HOSPITALIZATION:** Fill in information for all owners or Shareholders. (Do not fill in this section if your business operates as a "C" Corporation)

<u>Owner Name</u>	<u>Monthly Payment</u>	<u>Annual Premium</u>	<u>Paid by the business</u>
			YES / NO
			YES / NO
			YES / NO

**(9) OTHER INFORMATION:** Please list any other information you may feel that is required in completing your business tax returns.

**(10) ACCOUNTS PAYABLE:**

(Bills my business owes as of \_\_\_\_\_ close of year)

(PERTAINS TO BUSINESS ONLY – NOT PERSONAL)

<u>To Whom Owed</u>	<u>Description Mdse., Supplies, Auto Exp. Etc.</u>	<u>Account Code</u>	<u>Amount</u>
			\$ _____

(Attach additional sheets if necessary)

TOTAL \$ \_\_\_\_\_