

2023 Partnership Tax Questionnaire

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

Be sure to attach a copy of the partnership agreement or addendum if you have already given us a copy.

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	State	Zip
County	Home phone	Work or Cell	

What is this partner's guaranteed payments for 2023 in the current 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	State	Zip
County	Home phone	Work or Cell	

ATTACH LIST FOR ADDITIONAL PARTNERS

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 partner's basis			
Partner's Distribution/GP Statement			
Did the company provide health insurance to partners? Yes No Does the company offer retirement benefits? Yes No			

Did you make any payments that require a 1099-NEC (\$600 or more to one person during the year) Yes No			
If yes, did you already file 1099-NEC 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>