TOWNSEND
TAX
SERVICES

2025 Business Tax Organizer

For any YES answers, please provide details and any supporting documentation.

YES	NO	
☐	☐	Has the address for your tax return changed?
☐	☐	Has the address for any owners or officers changed?
☐	☐	Were there any changes in owners or officers?
☐	☐	Do any owners or officer of the company have signature authority over a company financial account outside of the United States?
☐	☐	Did the company have any foreign bank accounts or foreign income?
☐	☐	Were any payments made to foreign members/partners/shareholders?
☐	☐	Did the company refinance or take out any loans?
☐	☐	Did the company enter into any new lease agreements?
☐	☐	Did the company purchase or lease any vehicles?
☐	☐	Were all form 1099s filed as required for total payments exceeding $2,000 per year?
☐	☐	Was business conducted outside of the company's home state?
☐	☐	Did the business offer a group health insurance plan for eligible employees?
☐	☐	Did the business reimburse any employees for individual health insurance premiums (not including the company group health plan)?
☐	☐	Did any owners have reimbursed business expenses? If so, does the company have an accountable plan in place?
☐	☐	Did the company have a fixed asset capitalization policy?
☐	☐	Did the company offer/modify a retirement/pension plan?
☐	☐	Did the company purchase an auto eligible for the clean vehicle credit?

☐ ☐ Were there any changes to the company's operating agreement or other legal documents?

☐ ☐ Does the company have written evidence to support business expenses? In the event of an audit, taxing authorities will require items like bank statements, credit card statements and/or receipts.

☐ ☐ Does the company anticipate any significant changes to income or expenses in the near future?

☐ ☐ Does the company plan to move locations?

☐ ☐ Is the company considering any changes in ownership or admittance of new owners?

☐ ☐ Are there any new lines of business or ventures anticipated?

☐ ☐ Did the business receive any prior year tax notices?

☐ ☐ If this is the first year of a partnership or LLC, are either a Form 8832 or 2553 needed? (to elect to be taxed as an s-corporation)

☐ ☐ If this is the final year of the entity, was a Form 966 (for corporations) filed? Was the entity dissolved with the Secretary of State?

☐ ☐ Are there any significant changes to the business that you would like to review with us?