



2011 Business Tax Questionnaire

PLEASE COMPLETE THE FOLLOWING CONTACT INFORMATION:

BUSINESS NAME: _____

ADDRESS: _____

PRIMARY CONTACT: _____ **TITLE:** _____

E-MAIL: _____ **FAX:** _____

BUSINESS PHONE: _____ **CELL PHONE:** _____

SECONDARY CONTACT: _____ **TITLE:** _____

E-MAIL: _____ **FAX:** _____

BUSINESS PHONE: _____ **CELL PHONE:** _____

Please indicate your preferred method of contact: _____

Please provide the e-mail address for your paperless bill: _____

Check here to OPT OUT of paperless billing

Please indicate how you would like to receive your tax return:

- Secure Website** (if you choose this option, you can access, print or e-mail your tax return any time in the future.)
- Printed Copy**
- Both Secure Website & Printed Copy**

INSTRUCTIONS:

Complete this form and save a copy in your files. Submit along with the following:

- _____ Reconciled Accountants Copy of your QuickBooks file with a 1/1/12 dividing date (or first day of your new fiscal year)
- _____ If your records are not in QuickBooks, please provide a two year comparative set of financial statements. (At minimum a Balance Sheet, Profit & Loss Statement, or summary of business income and expenses)
- _____ Year end statements for any bank accounts, business loans and/or credit cards if not already reconciled.
- _____ Signed Shaw & Associates Representation Letter (visit www.KevinShawCPA.com, Resources, Client Forms)

NEW CLIENTS ONLY – Please include the following, if applicable.

- _____ Prior year tax return (federal and state)
- _____ Prior year depreciation schedules (you may need to contact your previous tax preparer)
- _____ Articles of incorporation/organization, by laws, and/or operating agreement
- _____ FEIN: _____ State Account Number _____
- _____ IRS acceptance letter of S-corporation status, if applicable

We prefer you submit your information and QuickBooks file through our secure system, Sharefile. If you do not already have a link, please e-mail cassy@KevinShawCPA.com and request a link to upload files. You can also fax the information to 970-223-6509 or mail/deliver to 1044 West Drake Road, Suite 201, Fort Collins, CO 80526.

Do you send your file via Intuit? Enter your QuickBooks Transfer Password here: _____



TURNAROUND TIMES:

We will make every effort to prepare your tax return as quickly as possible. The following chart shows our approximate turnaround times after we receive your complete tax information.

Client Document Submission Date	Turnaround Time
Prior to February 10, 2012	Approximately 2 weeks
After February 10, 2012	Approximately 3-4 weeks
After March 2, 2012	An extension may be necessary (for Corporations and LLCs filing as Corporations)
After March 23, 2012	An extension may be necessary (for LLCs & Sole Proprietorships)

Note: Our expected turnaround times assume that we receive complete and reconciled books of record. If the books need significant work, this will increase turnaround time and cost to prepare the tax return and possibly require an extension.

TAX INFORMATION:

Please answer each question. If a question is not answered, we will assume it is not applicable to your current situation. If you are unsure, please note your questions in the comments. If any of this information is accounted for in your books of record, you do not need to provide us with the information twice. Please note “recorded in books” in the comments section.

Business Vehicle Information: The IRS is beginning to enforce more stringently requirements for detailed mileage records that support business use of vehicles. It is the responsibility of the business to have these records available upon the request of the IRS. While we do not require that you provide us with these detailed records, please summarize business vehicle use below:	
- Vehicle 1:	
Year, Make, Model	
Total Business Miles for January 1, 2011 – June 30, 2011	
Total Business Miles for July 1, 2011 – December 31, 2011	
Total 2011 Miles (Business and Personal Combined)	
Additional 2011 expenses for vehicle not already in books (unless the standard mileage deduction will be used for this vehicle) If information does not fit in the box, please submit separately.	
- Vehicle 2:	
Year, Make, Model	
Total Business Miles for January 1, 2011 – June 30, 2011	
Total Business Miles for July 1, 2011 – December 31, 2011	
Total 2011 Miles (Business and Personal Combined)	
Additional 2011 expenses for vehicle not already in books (unless the standard mileage deduction will be used for this vehicle) If information does not fit in the box, please submit separately.	



If any of this information is accounted for in your books of record, you do not need to provide us with the information twice. Please note "recorded in books" in the comments section

TAX INFORMATION CONTINUED:

Home Office Information If the business owner works out of the home, please complete the following:	
2011 Total Mortgage Interest	
2011 Property Taxes	
2011 Total Utility Costs (Electric, Gas, Water, Sewer, Trash)	
2011 Total Property Insurance Costs	
2011 Maintenance Expenses	
2011 Repairs	
2011 HOA Fees	
Other expenses for 2011:	
Other expenses for 2011:	
If home office is new in 2011 or if you have changed home office square footage:	
-Date home office first used.	
-Square footage of the space used solely for business.	
-Total finished square footage of the home, not including unfinished basements and garages.	
-If home newly purchased, purchase price of home plus cost of major improvements.	

General Business Tax Information	YES	NO	COMMENTS
Did the business receive any notices from the IRS or the State during the past year regarding taxes? (Please provide a copy if you have not already sent one to us)			
Were there any ownership changes during the year? If so, please provide dates of changes; names, addresses, and social security numbers of new owners; and new ownership percentages.			
Did the business purchase any fixed assets in 2011? If yes, please provide details including description, purchase date, and purchase amount (if not already detailed in your books) .			
Did the business sell or dispose of any fixed assets in 2011? If yes, please provide detail including description, sale/disposal date, and sale amount (if not already detailed in your books) .			
Are the 941, 940, and state payroll tax filings current?			
Does the business have any sales and use tax licenses (state and city)? -If so, are the tax filings current?			
Does the business have a retirement plan (401(k), solo 401(k), SEP, Simple IRA, etc.)? -If yes, has the owner made any current year contributions on behalf of him/herself? -If yes, will there be any additional contributions before the tax return is filed? If so, how much? -If no, does the business owner want to create a plan before the tax return is filed?			
Did the business owner use personal funds to pay for any business items in 2011 that are not detailed in your books ? -If so, please include a summary by expense category. If information does not fit in the comments box, please submit separately.			



If any of this information is accounted for in your books of record, you do not need to provide us with the information twice. Please note "recorded in books" in the comments section

General Business Tax Information Continued	YES	NO	COMMENTS
Does the business owner have health insurance for the owner and/or owner's family that is not under a group plan?			
-If so, please provide the total paid in 2011 for the business owner and family. (If not already detailed in your books)			
Does the business use any credit cards or have any loans on the books that are in the name of the owners (taken out under the owner's tax ID, not business tax ID)? -If so, please provide a list of these credit cards and loans.			
Did the business owner personally guarantee any loans for the business? -If yes, please provide a list of these loans.			
Does the business owner or designee want to review the tax return before it is e-filed?			

Shaw & Associates provides a full range of business services to our clients. Please indicate below if you need assistance in any areas in the coming year.

	YES	NO	COMMENTS
TAX SERVICES			
Tax Planning and Consultation –Minimize tax liability and make the most of available tax deductions throughout the year.			
IRS Representation –Assistance with IRS, and State Tax Notices. Settle past IRS debt, often at a lower negotiated amount.			
Business Retirement Plan (for employees) – There are significant tax deductions available for both employer and employees.			
FINANCIAL SERVICES			
Personal Retirement Plans – IRAs, SEP IRAs, Roth IRAs, 401(k)			
Investment Reviews and Analysis – Develop strategies to address volatility and accomplish long term goals.			
Insurance Review - Life, Key Person, Buy-Sell, Health, Long Term Care			
ACCOUNTING & BOOKKEEPING SERVICES			
Business Consulting – Profitability Analysis, Inventory Control Management, Business Growth Management			
Financial Statement Preparation			
Assistance Obtaining Business Financing, Loan Presentation Preparation			
Training – QuickBooks, Payroll, or other Bookkeeping Training			
QuickBooks Version Upgrade – Version 2009 or older will no longer be supported by QuickBooks effective 2012. As a QuickBooks ProAdvisor, we can offer you a discount on your software. Would you like to upgrade your version?			
Payroll Assistance – Quarterly Payroll Tax Filings			
Payroll Assistance – Ongoing Payroll Assistance			
W-2 Preparation or 1099 Preparation (please specify in comments)			
Sales Tax Filing			
Monthly, Quarterly, or Year-End File Reviews/Clean Up			
Other – please specify in comments			

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