

Kofsky Weinger, PA

Business Entity Questionnaire

Instructions: Answer all questions to which you know the answers. If unknown, leave blank. (Don't worry if you don't know... many are technical tax questions.)

Questions Related to All Entities	Yes	No
At any time during the year, did this business have an interest in, or a signature, or other authority over a financial account in a foreign country such as a bank, securities or other financial accounts?	<input type="checkbox"/>	<input type="checkbox"/>
Did this business have any changes in ownership during the year, including percentage of ownership interest?	<input type="checkbox"/>	<input type="checkbox"/>
During the year, did this business have any debt that was cancelled, forgiven, or had the terms modified so as to reduce the principal amount of the loan?	<input type="checkbox"/>	<input type="checkbox"/>
Was there any change in determining qualities, costs, or valuations between opening and ending inventory?	<input type="checkbox"/>	<input type="checkbox"/>
Does this business have any foreign partners or shareholders?	<input type="checkbox"/>	<input type="checkbox"/>
Did this business pay any taxes to a foreign government during the tax year?	<input type="checkbox"/>	<input type="checkbox"/>
Did this business purchase any nonconventional source fuel during the tax year?	<input type="checkbox"/>	<input type="checkbox"/>
Did this business pay any expenses during the tax year to make the business accessible or usable by individuals with disabilities?	<input type="checkbox"/>	<input type="checkbox"/>
Did this employer pay any FICA on employee wages for tips above minimum wage?	<input type="checkbox"/>	<input type="checkbox"/>
Did this business incur any research and experimental expenditures during the tax year?	<input type="checkbox"/>	<input type="checkbox"/>
During the current tax year, did this business hire any new employees from one of the following targeted groups: veterans or unemployed veterans, disconnected youth, ex-felons, vocational rehabilitation referrals, high-risk or summer youths, or AFDC, food stamp or SSI recipients?	<input type="checkbox"/>	<input type="checkbox"/>
Did this business incur start-up expenses for a small employer pension plan this year?	<input type="checkbox"/>	<input type="checkbox"/>
Did this business hire any employees who were unemployed (except for 40 hours) during the 60-day period preceding their start date?	<input type="checkbox"/>	<input type="checkbox"/>
Does this business provide child care facilities or services to its employees?	<input type="checkbox"/>	<input type="checkbox"/>
Did this business purchase an alternative fuel vehicle during this year?	<input type="checkbox"/>	<input type="checkbox"/>
Does this business qualify for one of the many special fuels credits?	<input type="checkbox"/>	<input type="checkbox"/>
List any other business credit this business may qualify for:	<input type="checkbox"/>	<input type="checkbox"/>
Has this business filed, or is it required to file, Form 8918, a material Advisor Disclosure Statement?	<input type="checkbox"/>	<input type="checkbox"/>

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<i>Questions Related to Partnerships</i>	Yes	No
At any time during the year, was any partner in this partnership a disregarded entity, a partnership, a trust, an S-corporation, an estate, or a nominee or similar person?	_____	_____
At the end of the year, did any foreign or domestic corporation, partnership or entity treated as a partnership, trust, individual or estate own directly or indirectly 50% or more of the profit, loss, or capital of the partnership?	_____	_____
At year-end, did this partnership own directly 20% or more, or own directly or indirectly, 50% or more of the total voting power of all classes of stock entitled to vote of any foreign or domestic corporation?	_____	_____
Was there a distribution of property during the tax year?	_____	_____
Name of Tax Matters Partner:	_____	
Tax ID Number of Tax Matters Partner:	_____	
Address of Tax Matters Partner:	_____	

<i>Questions Related to Corporations</i>	Yes	No
Is this corporation a member of a controlled group of corporations? If yes, provide details.	_____	_____
Is this corporation a personal holding company?	_____	_____
Is this corporation a qualified personal service corporation?	_____	_____
Is this corporation a subsidiary in an affiliated group or parent-subsidiary controlled group? If yes, provide details of all other related corporations.	_____	_____
At the end of the year, did any foreign or domestic corporation, partnership, trust, estate, tax-exempt organization or individual own directly 20% or more or own directly or indirectly, 50% or more of the total voting power of all classes of stock entitled to vote?	_____	_____
At the end of the year, did this corporation own directly 20% or more, or own directly or indirectly 50% or more of the total voting power of all classes of stock entitled to vote of any foreign or domestic corporation?	_____	_____
At any time during the tax year, did one foreign person own, directly or indirectly, at least 25% of (1) the total voting power of all classes of the corporations' stock entitled to vote or (2) the total value of all classes of the corporation's stock?	_____	_____
Has this corporation made any estimated tax payments for the current tax year?	_____	_____
Did this corporation receive any dividends from another corporation?	_____	_____
Did this corporation pay compensation to any of its officers and have total receipts of \$500,000 or more? If yes, provide name, Social Security number, percent of time devoted to business, percent of corporation common stock and preferred stock owned, and amount of compensation paid to the corporation officer.	_____	_____

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During this tax year, did the corporation pay dividends (other than stock dividends and distributions in exchange for stock) in excess of the corporation's current and accumulated earnings and profits?

Did this corporation issue publicly-offered debt instruments with original issue discount?

Did this corporation earn any tax exempt interest during this tax year?

If this is an S-corporation, does it have any built-in gains or earnings and profits from when it was a C-corporation, or any assets acquired from a C-corporation with a basis determined by reference to its basis in the hands of a C-corporation?

Was the number of shareholders at the end of the year fewer than 100? (If so, a list of shareholders is required.)