

## 2021 BUSINESS TAXPAYER INFORMATION WORKSHEET

Type of Entity:    1120/C Corp    1120S/S Corp    1065 Partnership    1120H    990

Legal Name		EIN#	
Address		Date Business Started	
		Phone Number:	
Email Address		Alt. Phone Number:	

### OWNERS OR OFFICERS:

Name: \_\_\_\_\_ SS#: \_\_\_\_\_ Percentage \_\_\_\_\_ Title \_\_\_\_\_  
 Name: \_\_\_\_\_ SS#: \_\_\_\_\_ Percentage \_\_\_\_\_ Title \_\_\_\_\_  
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 Name: \_\_\_\_\_ SS#: \_\_\_\_\_ Percentage \_\_\_\_\_ Title \_\_\_\_\_

### TEXAS COMPTROLLER FRANCHISE TAX

Please provide your e-filing "XT" number: \_\_\_\_\_

### PAYCHECK PROTECTION PROGRAM (PPP) LOAN

Did you receive a Paycheck Protection Program (PPP) Loan?    Yes    No

If yes, Date Funded: \_\_\_\_\_ Amount Received: \_\_\_\_\_

### ECONOMIC IMPACT DISASTER LOAN (EIDL)

Did you receive a Economic Impact Disaster Loan (EIDL)?

If yes, Date Funded: \_\_\_\_\_ Amount Received: \_\_\_\_\_

Yes    No   Were W2s issued this year?   If so, please include a copy of the 2020 Form W3.  
 Yes    No   Were 1099s issued this year?   If so, please include a copy of the 2020 Form 1096.

### QUICKBOOKS INFORMATION

Version:    Desktop \_\_\_\_\_    Online  
 Admin login: \_\_\_\_\_ PW: \_\_\_\_\_

### Taxpayer Responsibilities

- You agree to provide us all income and deductible expense information. If you receive additional information after we begin working on your return, you must contact us immediately to ensure your completed tax returns contain all relevant information.
- You affirm that all expenses or other deduction amounts are accurate and that you have all required supporting written records. In some cases we may ask to review your documentation.
- You must be able to provide written records of all items included on your return if audited by either the IRS or state tax authority. We can provide guidance concerning what evidence is acceptable.
- You must review the return CAREFULLY before signing to make sure the information is correct.  
Fees MUST be paid before your tax return is delivered to you or filed on your behalf. If you terminate the engagement before completion, you agree to pay a fee for work completed. A retainer is required for preparation of late returns.
- You should keep a copy of your return and any related tax documents for 7 years.

By signing below you acknowledge that you have read, understand, and accept your obligations and responsibilities. This includes the information you have provided on this organizer and the information provided on your Partnership Tax Engagement Letter.

\_\_\_\_\_  
 Shareholder/Officer Signature                      Date                      Title