

Name _____

PARTNERSHIP/LLC 2023 TAX PREPARATION QUESTIONNAIRE (Form 1065)

1. **2023 Form W-3**, if applicable, must be provided for us to begin
2. Did the partnership file, or will it file all **Forms 1099**? **Y/N**
3. Does the partnership maintain inventory? **Y/N**
If yes, total value at cost on 12/31 _____
4. Did any partner contribute cash or property to the partnership? **Y/N**
5. Did any partner take a cash distribution during the year? **Y/N**
6. Did the partnership sell, exchange, or purchase any real estate during the year. **Y/N**
7. Did the partnership distribute any guaranteed payments to a partner? **Y/N**
8. Did the partnership pay any health insurance premiums for partners? **Y/N**
9. Did the partnership make any contributions to a pension or IRA for partners? **Y/N**
10. For business-owned vehicles used personally provide:
Total miles driven _____ **Business** miles driven _____ for the year
11. Are any of the partners a foreign individual, entity, or trust? **Y/N**
12. Did the partnership have any foreign income or a foreign bank account? **Y/N**
13. ASSETS -
 - a. Did the business purchase assets over \$2,500 (or per your capitalization policy) **Y/N**
 - b. If yes, provide a list with (1) **description** (2) **date** purchased and (3) **cost** of new asset(s).
 - c. Review enclosed **Future Depreciation Report** and note **date** disposed and **sale price** of any assets no longer in service or sold.