



***\*Please be advised that we will electronically file your business tax return for the 2023 tax year.\****

***This applies to your federal return, plus any required state returns that are eligible for e-filing.***

**\*PLEASE NOTE THAT THIS DOES NOT INCLUDE COUNTY TANGIBLE RETURNS  
THOSE WILL CONTINUE TO BE PAPER FILED\***

If you DO NOT wish to e-file, please notify our office (or your tax preparer) as soon as possible via phone (813) 985-1148 or email. **We are REQUIRED to obtain a signature from you before we are allowed to transmit to the IRS.**

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**Company Name:** \_\_\_\_\_ **Email Address:** \_\_\_\_\_

**Please take a few moments to answer the following questions, which will assist us in preparing an accurate return:**

Yes No

- 1. Did the business have a change of name or address during the year?
- 2. Any changes in names, addresses or ownership % for shareholders / members / partners, tax matters partner or officers during the year? NEW: Please provide a copy of a valid driver's license or passport for each owner.
- 3. Were there any significant changes in the entity's business or operations, or partnership operating agreement during the year?
- 4. Did the business have an interest in, or a signature or other authority over a bank account, securities account or any other assets in a foreign country during the year?
- 5. Did the business make any payments of rents, commissions, or contract labor during the year that would require it to file Form(s) 1099? If yes, did or will the business file the required Form(s) 1099?
- 6. If the business has employees, please provide a copy of Form W-3, and W-2(s) and all four Form 941s.
- 7. If the business has employees, did you pay health insurance premiums for your employees this year?
- 8. Did the business receive any tax related correspondence during the year from the State, County or IRS?
- 9. Did the business acquire or dispose of any fixed assets (furniture, equipment, real estate, leaseholds) during the year?
- 10. Does the business own vehicles? If yes, provide details (payment statement, finance paperwork, lease, etc.)
- 11. Was there any new, retired or refinanced business debt during the year?
- 12. Were there any dividends or distributions paid from the business to shareholders / members / partners during the year? If so, please provide details of amounts paid.
- 13. Were fringe benefits paid to, or on behalf of, owners who have a greater than 2% ownership?
- 15. Did the business pay for key-person life insurance or disability insurance on the life of any shareholders / members / partners during the year?
- 16. Were there any non-business related expenses paid by the business on behalf of any shareholders / members / partners during the year?
- 17. If any shareholders / members / partners live in a different state or outside the United States, please provide details. The business may be subject to withholding requirements.
- 18. Did the business make any estimated business income tax payments during the year?
- 19. If the entity maintains inventory, was there a change in the method of determining quantities, cost, or valuations between opening and closing inventory during the year?

**IMPORTANT: IF YOU ANSWERED YES to any questions, PLEASE PROVIDE ADDITIONAL DOCUMENTATION.**

Hanna, Lemar & Morris, CPA's, PA  
(813) 985-1148