



2022 Partnership Tax Questionnaire

Business Name	
Contact Name	
Contact Email	
Contact Phone Number	
Legal Business Address	
City, State, Zip Code	

Please answer the following questions necessary to prepare your tax return:

You will receive electronic copies of all returns prepared. Do you also want a paper copy of your returns mailed to you? This will incur a \$25 charge for processing and postage.	<input type="checkbox"/> Yes <input type="checkbox"/> No
At any time during 2022, did you receive, sell, send, exchange or otherwise acquire any financial interest in any virtual currency?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Did the business conduct activities in other states? If so, provide gross revenue by state.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Were there any changes to partners/members contact info or ownership percentages?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Does the business have any foreign financial accounts or sales?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Please provide the guaranteed payments and/or distributions paid to each partner.	
Provide amount of health and accident premiums paid on behalf of the owners, if applicable.	

Please provide the following Tax documents needed to prepare your return:

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| <ul style="list-style-type: none"> <input type="checkbox"/> Provide 2022 W-3 showing all wages paid to employees, unless we have access in Gusto <input type="checkbox"/> Provide description, purchase date and original cost for all assets acquired in 2022 <input type="checkbox"/> Provide 2022 profit and loss statement with prior year comparison, unless prepared by Momentum <input type="checkbox"/> If you had unreimbursed mileage or home office expenses, complete and attach the Accountable Plan template | <ul style="list-style-type: none"> <input type="checkbox"/> Provide 2022 1096 (or all 1099's) showing all independent contractors paid <input type="checkbox"/> Provide description, sales date and sales proceeds for all assets sold or disposed of in 2022 <input type="checkbox"/> Provide 2022 balance sheet with prior year comparison, unless prepared by Momentum <input type="checkbox"/> If you didn't use an accounting system to track income and expenses, complete and attach the Partnership organizer template |
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PARTNERSHIP INCOME & EXPENSES

Business Name _____ Industry _____

PPP Funds Forgiven \$ _____ Date _____ (if applicable)

INCOME

Gross Receipts/Sales _____
 Returns/allowances _____
 Other _____

COST OF GOODS SOLD

Inventory @ beginning of year _____
 Purchases less items used personally _____
 Cost of labor _____
 Materials & Supplies _____
 Inventory @ end of year _____

EXPENSES

Advertising _____	Repairs & Maintenance _____
Bad Debts _____	Supplies _____
Employee Benefits Paid _____	Taxes (payroll, property) _____
Insurance _____	Travel _____
Interest Paid _____	Meals _____
Legal & Professional Fees _____	Telephone _____
Licenses & Permits _____	Utilities _____
Office Expenses _____	Wages & Salaries _____
Rent Paid _____	_____

ASSET & LIABILITY BALANCES as of 12/31/2022

Checking _____	Accounts Payable _____
Savings _____	Credit Cards Payable _____
Other bank accounts _____	Payroll Tax Payable _____
Accounts Receivable _____	Sales Tax Payable _____
Loans to Shareholders _____	Loans from Shareholders _____
Other Assets (i.e. deposits) _____	Mortgage, notes _____
Fixed Assets _____	Other _____

Auto Expense Worksheet
(Business use of personal vehicle)

Description of Vehicle _____
Date placed in service (if new) _____
Total miles for the year _____
Business miles January-June (\$0.585/mile) _____
Business miles July-December (\$0.625/mile) _____

ACTUAL EXPENSES

Registration	_____
Gas, oil & repairs	_____
Interest Paid	_____
Parking tolls	_____

Do you have evidence to support business use? Yes No
Is the vehicle available off duty hours? Yes No
Was the vehicle used primarily by a >5% owner? Yes No
Is another vehicle available for personal use? Yes No

Home Office Worksheet
(If used for business and no other location is available)

Total area of house _____ Area used for Business _____

INDIRECT EXPENSES (to be allocated)

Mortgage Interest/Rent	_____
Real Estate Taxes	_____
Insurance	_____
Utilities	_____
Repairs & Maintenance	_____
Other	_____

DIRECT EXPENSES (specific to office space)

Utilities (metered separately)	_____
Repairs & Maintenance	_____