

TANISHA MILLS CPA

Phone: (619)302-9550 Fax: (619)923-1020 Email: info@tanishamillscpa.com

Tax Services Questionnaire

1. What kind of tax services are you seeking?

Current year tax returns filing

Filing back taxes (if yes, list years to be filed) Installment Agreement

Offer in Compromise

Tax Planning

Wage Garnishment Reversal

Injured Spouse Refund Allocation

Other (please explain)

2. Do you have an incorporated business? If yes, please complete the following:

Type of entity (C-Corp, S-Corp, LLC, etc): _____

State Where Incorporated: _____ Year Incorporated: _____

Income earned in states other than state where incorporated? _____

Industry/Type of Business: _____

Number of Shareholders, Partners or Managing Members: _____

Last filing date/year FEDERAL taxes were filed: _____

Last filing date/year STATE taxes were filed: _____

Is Corporation active/In good standing in state where filed? _____

Employees or regularly paid contractors? (Yes/No) _____

3. Are source documents available for tax return preparation? (Yes/No) _____

If not, may we contact the IRS or State taxing authorities to obtain missing documents if necessary? (Yes/No) _____

Additional Comments/Notes:

Name _____

Date: _____