

Name: _____

2018 Business Tax Questionnaire

Please check the appropriate box and include all necessary details and documentation.

General

Yes No

1. How would you like your tax return delivered to you? (choose at least one)

_____ on the portal _____ pick up a flash drive _____ paper copy

2. Is your 2018 tax situation substantially different than it was in 2017?

Business Credits

There are credits available to businesses as incentives to take specific actions or adopt desired policies. The questions below are intended to spur conversation between you and your tax manager if actions taken in your business may qualify.

1. Have you employed, or do you plan to employ, one of the following:

* a qualified IV-A recipient

* a qualified veteran

* a qualified ex-felon

* a designated community resident (previously called "high risk youth")

* a vocational rehabilitation referral

* a qualified summer youth employee

* a qualified supplemental nutrition assistance program (SNAP) benefits recipient

* a qualified SSI recipient

* a long-term family assistance recipient

* a qualified long-term unemployment recipient

2. Have you incurred qualified rehabilitation expenses for a certified historic structure used for residential or nonresidential purposes?

3. Have you incurred expenses to modify a business property to facilitate the access and use of that property by disabled individuals?

4. Are you a food and beverage establishment that pays social security taxes on tip income in excess of the minimum wage?

5. Did you incur expenses to establish or administer a new qualified plan, SIMPLE plan, Section 403(a) annuity plan, or SEP that includes at least one employee who is not a highly compensated individual?

6. Did you pay qualified child care expenses on behalf of employees during the year?

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Yes No

7. Did you install energy property on business property including:

* equipment which uses solar energy to generate electricity, to heat or cool (or provide hot water for use in) a structure, or to provide solar process heat, excepting property used to generate energy for the purposes of heating a swimming pool

* equipment which uses solar energy to illuminate the inside of a structure using fiber-optic distributed sunlight but only with respect to property the construction of which begins before January 1, 2022

* equipment used to produce, distribute, or use energy derived from a geothermal deposit, but only, in the case of electricity generated by geothermal power, up to (but not including) the electrical transmission stage

* qualified fuel cell property or qualified microturbine property

* combined heat and power system property

* qualified small wind energy property

* equipment which uses the ground or ground water as a thermal energy source to heat a structure or as a thermal energy sink to cool a structure, but only with respect to property the construction of which begins before January 1, 2022

8. Have you incurred any expenses for wages or supplies to conduct qualified research or experimentation or paid for qualified research under a contract?

9. Did you pay wages to employees who have been employed for a year or more during any period in which the employee is on family and medical leave (FMLA)?

10. Are you a small employer (no more than 25 FTE employees) who purchased health coverage for your employees and paid at least 50% of the premiums?