

### General Information

<b>Business legal name</b>			<b>EIN</b>	
Doing business as		Date business started		Entity type
Street		City	State	ZIP Code
Business activity			Product or service	
Phone		Accounting method: <input type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other _____		
Accounting period: <input type="checkbox"/> Calendar year <input type="checkbox"/> Fiscal year <input type="checkbox"/> Short tax year			Beginning date	Ending date

### Partnership Representative

Partnership representative			SSN	
Street		City	State	ZIP Code
Email		Phone		

### Questionnaire

<input type="checkbox"/> Yes <input type="checkbox"/> No	Did our firm prepare the 2022 tax return for this business?
<input type="checkbox"/> Yes <input type="checkbox"/> No	Did the business change its legal name?
<input type="checkbox"/> Yes <input type="checkbox"/> No	During the 2023 calendar year, did the partnership have an interest in or a signature or other authority over a financial account in a foreign country?
<input type="checkbox"/> Yes <input type="checkbox"/> No	Did the partnership pay \$600 or more of nonemployee compensation to any individual during the year?
<input type="checkbox"/> Yes <input type="checkbox"/> No	Did or will the partnership file required Form(s) 1099?
<input type="checkbox"/> Yes <input type="checkbox"/> No	At the end of the tax year did any foreign or domestic corporation, partnership, trust, or tax-exempt organization, or any foreign government own, directly or indirectly, an interest of 50% or more in the profit, loss, or capital of the partnership?
<input type="checkbox"/> Yes <input type="checkbox"/> No	At the end of the tax year did any individual or estate own, directly or indirectly, an interest of 50% or more in the profit, loss, or capital of the partnership?
<input type="checkbox"/> Yes <input type="checkbox"/> No	At the end of the tax year, did the partnership own directly 20% or more, or directly or indirectly own, 50% or more of the total voting power of all classes of stock entitled to vote of any foreign or domestic partnership?
<input type="checkbox"/> Yes <input type="checkbox"/> No	At the end of the tax year, did the partnership directly own an interest of 20% or more, or directly or indirectly own, an interest of 50% or more in the profit, loss, or capital in any foreign or domestic partnership or in the beneficial interest of a trust?
<input type="checkbox"/> Yes <input type="checkbox"/> No	Did the partnership have any debt that was canceled, was forgiven, or had the terms modified so as to reduce the principal amount of the debt?

# Partnership Tax Organizer

Income			
Gross receipts or sales	\$	Gross rents	\$
Returns and allowances	\$	Gross royalties	\$
Dividends	\$	Net gain (loss)	\$
Interest	\$	Other income	\$

Cost of Goods Sold (COGS)			
Beginning of year inventory	\$	Other costs	\$
Purchases	\$	End of year inventory	\$
Cost of labor	\$	Inventory method:	

Expenses			
Advertising	\$	Office expenses	\$
Automobile expense	\$	Postage and shipping	\$
Bad debts	\$	Professional education and training	\$
Bank charges	\$	Rent or lease - car, machinery, equipment	\$
Cleaning and janitorial	\$	Rent or lease - other business property	\$
Contract labor	\$	Repairs and maintenance	\$
Dues and subscriptions	\$	Retirement plans	\$
Employee benefit programs	\$	Software	\$
Entertainment	\$	Supplies	\$
Guaranteed payments to partners	\$	Taxes - payroll	\$
Healthcare plans - employees	\$	Taxes - local and property	\$
Insurance - other than health	\$	Taxes - other	\$
Interest	\$	Telephone	\$
Internet	\$	Tools	\$
Legal and professional services	\$	Travel	\$
Licenses and permits	\$	Utilities	\$
Meals	\$	Other expenses	\$

# Partnership Tax Organizer

Balance Sheet			
Assets		Liabilities and capital	
Cash and bank accounts	\$	Accounts payable	\$
Trade notes and accounts receivable	\$	Payables less than one year	\$
Inventories	\$	All nonrecourse loans	\$
Loans to partners	\$	Loans from partners	\$
Mortgages and loans held by partnerships	\$	Payables more than one year	\$
Stock, bonds, and securities	\$	Other liabilities	\$
Other assets	\$	Partners' capital accounts	\$
		Retained earnings	\$

Asset Listing (non-inventory assets costing more than \$2,500)					
Complete if acquired during 2023			Complete if sold or disposed of during 2023		
Description of property	Date acquired	Cost	Date sold or disposed	Sale price	Expenses of sale
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					

# Partnership Tax Organizer

## Partners

Partner name		TIN		Entity type	
Street		City		State	ZIP Code
Email			Phone		
Check one:	<input type="checkbox"/> General partner or LLC member-manager	Check one:	<input type="checkbox"/> Domestic partner	Country of citizenship or organization	
	<input type="checkbox"/> Limited partner or other LLC member		<input type="checkbox"/> Foreign partner		
Ownership percentage (BOY)		Capital contributions during the year		Amount paid for health insurance premiums	
Ownership percentage (EOY)		Distributions during the year		Guaranteed payments	

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