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If any of the following items pertain to your business in 2020,
please check the appropriate box and provide additional information if necessary.

BUSINESS/FARM/RENTAL

YES NO

- Did you start a new business in 2020 or create any new entities (ex. LLC)?
If yes, please provide articles of organization and EIN for the LLC or information regarding the new business.
- Did you trade in, purchase, or dispose of any business assets (equipment, vehicles, real estate, etc.), or convert any personal assets to business use? If so, provide invoice. Use attached business asset listing (if applicable) to mark disposed items.
- Did you exclude from meals your non-deductible entertainment expense?
- Did you pay employees wages while they were on family and medical leave? If so, what amount was paid? \$_____
- Did your business (Sch C or Sch F) pay any individual \$600 or more during 2020 for services (ex. contract labor, custom hire, repairs, trucking, professional services) that would require a 1099 to be filed?
- If yes, and your business is required to file Forms 1099 did you prepare them or ask our office to prepare them? If you prepared the 1099s yourself, please provide a copy of the 1099s you filed.
- If your business has payroll and we do not prepare your W-2s, please provide a copy of your W-3 and W-2s.
- Did the business receive a PPP Loan?
- Was the PPP Loan fully forgiven? If yes, please provide documentation from bank regarding the PPP Loan being forgiven. Date of forgiveness? _____
- If you received an EIDL advance, please provide correspondence that states whether it is a loan or grant.
- Any change in shareholder addresses or any change in ownership percentages? If so, please note below:
