2022 Partnership (or Multi-member LLC) Tax Information Worksheet

*(*Please return this update with your signed engagement letter)*

Company name: _____

Contact person: _____ Phone number: _____

Physical address: _____

Mailing address: _____

Name of partner/LLC member who will sign the 2022 tax return. _____

Yes ☐ No ☐	Did the company change locations or add any locations in 2022?
Yes ☐ No ☐	Did the company ownership change during 2022? *If so, please provide the dates of changes, description of the change, as well as the names of persons that acquired or sold partnership/LLC interests in the company _____
Yes ☐ No ☐	Did the company acquire or dispose of any major assets during 2022? *If so, please provide invoices or bills of sale for asset or vehicle transactions, or closing documents for any real estate transactions.
Yes ☐ No ☐	Did the company begin any new lines of business or acquire ownership in another business in 2022? *If so, please describe. _____ _____
Yes ☐ No ☐	Did any partners/LLC members make loans to the company during 2022? If so, were promissory notes prepared for each of the loans? Yes ☐ No ☐ *If so, please provide copies of the notes.
Yes ☐ No ☐	Did the company repay any loans to partners/LLC members during 2022?
Yes ☐ No ☐	Did the company make payments on any non-partner/LLC member loans during 2022? *If so, please provide loan history or amortization schedule for 2022. If the loan started in 2022, please also provide a copy of the loan documents.
Yes ☐ No ☐	Is the company a partner in another partnership or multimember LLC?
Yes ☐ No ☐	During 2022, did any non-US person hold an interest in the company?
Yes ☐ No ☐	Did the partnership own directly or indirectly 20% or more of the total voting power of all classes of the voting stock of any foreign or domestic corporation?
Yes ☐ No ☐	Did the LLC/partnership receive PPP loan forgiveness in 2022?
Yes ☐ No ☐	Did the LLC/partnership apply for and/or receive the employee retention credit (ERC) in 2022 for wages paid in tax periods in 2020 or 2021?
Yes ☐ No ☐	Did the partners/LLC members make any capital contributions (cash or noncash) in 2022?
Yes ☐ No ☐	Did the LLC/partnership distribute any assets (cash or noncash) to LLC members/partners in 2022?

*If this is the first year Impact Tax Group is preparing your company return, please provide the following:

1. Copies of tax returns from the previous three years (unless this is the first year of existence of the business).
2. Names, Social Security numbers, addresses, and percentage ownership of all partners/LLC members.
3. Copy of letter from IRS assigning EIN
4. Copy of current partnership agreement.
5. Brief description of the principal business activity _____