



## \_\_\_\_\_ PARTNERSHIP TAX QUESTIONNAIRE

### GENERAL PARTNERSHIP INFORMATION

\_\_\_\_\_  
*Legal Name of Partnership*

\_\_\_\_\_  
*Trade Name/DBA*

\_\_\_\_\_  
*EIN*

\_\_\_\_\_  
*Year End*

\_\_\_\_\_  
*Address*

\_\_\_\_\_  
*City*

\_\_\_\_\_  
*State*

\_\_\_\_\_  
*Zip Code*

\_\_\_\_\_  
*Principal Business Activity*

\_\_\_\_\_  
*Principal Product or Service*

### PRINCIPAL PARTNERS OWNERSHIP INFORMATION

Please provide detailed information about each partner in the partnership for the tax year. For every partner, please provide their Full Name, Tax Identification Number (TIN) or Social Security Number (SSN), current Address, and their Ownership Percentage in the partnership.

| <i>Full Name</i> | <i>TIN/SSN</i> | <i>Address</i> | <i>Own %</i> |
|------------------|----------------|----------------|--------------|
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## PARTNERSHIP SPECIFIC QUESTIONS

Please answer each of the following questions to the best of your knowledge.

|   |                           |                          |
|---|---------------------------|--------------------------|
| Was the primary purpose of the partnership activity to realize a profit?  | <input type="radio"/> Yes | <input type="radio"/> No |
| Is there a written partnership agreement?   | <input type="radio"/> Yes | <input type="radio"/> No |
| Are all partners actively participating in the business?  | <input type="radio"/> Yes | <input type="radio"/> No |
| Is any partner in the partnership a disregarded entity, a partnership, a trust, an S corporation, or an estate?   | <input type="radio"/> Yes | <input type="radio"/> No |
| Is the partnership a partner in another partnership?  | <input type="radio"/> Yes | <input type="radio"/> No |
| Did any foreign or domestic corporation, partnership, trust, tax-exempt organization, individual, or estate own directly or indirectly 50% or more of the profit, loss, or capital of the partnership?  | <input type="radio"/> Yes | <input type="radio"/> No |
| Did the partnership own directly 20% or more, or own directly or indirectly, 50% or more of the total voting power of all classes of stock entitled to vote of any foreign or domestic corporation?   | <input type="radio"/> Yes | <input type="radio"/> No |
| Did the partnership have any debt that was cancelled, was forgiven, or had the terms modified so as to reduce principal amount of debt?   | <input type="radio"/> Yes | <input type="radio"/> No |
| At any time during the year, did the partnership have an interest in, or signature authority over a financial account in a foreign country?   | <input type="radio"/> Yes | <input type="radio"/> No |
| Was there a distribution of property or a transfer (by sale or death) of a partnership interest during the tax year?  | <input type="radio"/> Yes | <input type="radio"/> No |
| Did the partnership pay \$600 or more of nonemployee compensation to any individual?  | <input type="radio"/> Yes | <input type="radio"/> No |
| If Yes, did you issue Form 1099-NEC?  | <input type="radio"/> Yes | <input type="radio"/> No |
| At any time during this tax year, did the corporation (a) receive a digital asset (as a reward, award, or payment for property or services); or (b) sell, exchange, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? | <input type="radio"/> Yes | <input type="radio"/> No |

## PARTNERSHIP BUSINESS CREDITS

Please answer each of the following questions to the best of your knowledge.

|   |                           |                          |
|---|---------------------------|--------------------------|
| Did the partnership pay expenses to make it accessible by individuals with disabilities?                                  | <input type="radio"/> Yes | <input type="radio"/> No |
| Did the partnership pay any FICA on employee wages for tips above minimum wage?   | <input type="radio"/> Yes | <input type="radio"/> No |
| Did the partnership own any residential rental buildings providing qualified low-income housing?                          | <input type="radio"/> Yes | <input type="radio"/> No |
| Did the partnership incur any research and experimental expenditures during the tax year?                                 | <input type="radio"/> Yes | <input type="radio"/> No |
| Did the partnership have employer pension plan start-up costs?  | <input type="radio"/> Yes | <input type="radio"/> No |
| Did the partnership pay health insurance premiums for employees?  | <input type="radio"/> Yes | <input type="radio"/> No |
| Did the partnership purchase and place in service any electric vehicles or energy efficient commercial building property? | <input type="radio"/> Yes | <input type="radio"/> No |