

# Tax Preparer Questionnaire



Borrower Name: \_\_\_\_\_ Business Name (if applicable) \_\_\_\_\_

## **Information related to the Tax Preparer:**

1. What type of license do you hold?
  - CPA (Certified Public Accountant)
  - EA (Enrolled Agent)
  - CTEC registered tax preparer (California Tax Education Council)
  - PTIN (Preparer Tax Identification Number)
2. How long have you held your license? \_\_\_\_\_ years \_\_\_\_\_ months
3. Address where your tax preparation services are performed: \_\_\_\_\_
4. What is the nature of your work structure?
  - A - I own a tax preparation business
  - B - I work for a tax preparation business I do not own
  - C - I work independently and are not associated with any business
5. If selected 4A or 4B, what is the name of the business? \_\_\_\_\_
6. If selected 4A or 4B, how long have you owned or worked for this business? \_\_\_\_\_ years \_\_\_\_\_ months
7. Do you have any relation or affiliation with the borrower or business? If yes, please explain \_\_\_\_\_
8. Have you reviewed and/or filed the borrower's most recent tax returns? If no, please explain \_\_\_\_\_

## **Information related to the Borrower:**

1. How long have you filed and/or reviewed the borrower's self-employed tax returns? \_\_\_\_\_ years
2. What is the name of the borrower's business? \_\_\_\_\_
3. How long has the borrower been self-employed? \_\_\_\_\_
4. How long has the business been open? \_\_\_\_\_
5. What percentage of ownership does the borrower have in the business? \_\_\_\_\_
  - 5a. If less than 100% please provide the name(s) of the additional owners: \_\_\_\_\_
6. Will the use of business funds impact the business? \_\_\_\_\_
7. Is the borrower required to have a business license? \_\_\_\_\_
8. Provide a brief description of the borrower's business, including how income is generated, cost of goods/services sold, marketing, and labor (employees/other): \_\_\_\_\_
9. What is the business expense ratio? \_\_\_\_\_
10. Provide a detailed explanation of any P&L expenses which are not applicable to the borrower's business, if any: \_\_\_\_\_
11. Do you attest to the accuracy of the P&L and that financials were reviewed in the preparation of the P&L?  
Please enter N/A if you did not complete a P&L. \_\_\_\_\_

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By signing below, I acknowledge and understand the instructions and definitions, and have accurately represented them to the borrower's business on this form:

Signature: \_\_\_\_\_ Printed Name: \_\_\_\_\_

License Number: \_\_\_\_\_ Phone Number: \_\_\_\_\_ Type: Cell \_\_\_ Land Line \_\_\_

Email: \_\_\_\_\_ Date: \_\_\_\_\_

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