

TY2021

# Annual Business Information Form

For **ALL** businesses: Please fill out one form per business entity. This is for business documentation **only and must be filled out every year**. Please request an individual checklist for personal returns.

## Part I. Business Information

Your Name:	Business Name:	Business EIN:
Business Address:		Point of Contact:

Type of entity:    C Corporation          S Corporation          Partnership          Sole Proprietorship (Schedule C on individual return)

## Part II. Entity Information

### For new clients AND existing clients with new entities or changes to entities:

- Submit **all** IRS and DOR entity setup letters received. (CP575, Form 2553 acceptance, Secretary of State forms).
- List of all officers/members (name, address, SSN, percentage ownership):
  - Complete the **SHAREHOLDER INFORMATION FORM** in your Onvio portal.

**Please complete questionnaire below by checking “Yes”, “No/Not Applicable” to all questions. If you mark yes to any questions, please upload supporting documents. If assistance is needed, please call, or email the office.**

## Part III. Financial & Payroll Information:

### Yes No/Not Applicable

1. I have a Profit & Loss Sheet
  - If yes, upload 2-year comparison (if applicable)
2. I have a Balance Sheet
  - If yes, upload 2-year comparison (if applicable)
3. I have a list of Income & Expenses by category
  - If yes, upload **ONLY IF** you do not have a P&L and/or Balance Sheet (template provided upon request)
4. I have a Year End Bank Statement(s), Credit Cards and/or Loans
  - If yes, upload ending bank/loan/credit card statements & reconciliations if available for all accounts
5. I had a change in Fixed Assets **OR** Fixed Assets Purchase/Disposition with dates
  - If yes, upload report(s)
6. I have inventory and no balance sheet (for fiscal year filers or Schedule C)
  - If yes, upload inventory balance on **12/31/21**
7. I have sales in other states
  - If yes, upload a Sales by State Report
8. I have employees and/or payroll
  - If yes, upload the W3 and copies of all W2s
9. I have more than 30 employees **AND** they live in other states
  - If yes, upload Payroll by State Report
10. I bought or sold real property
  - If yes, upload Real Estate closing agreements - purchase and sale transactions
11. I made estimated corporate tax payments or paid business taxes due from prior year
  - If yes, upload copies of checks (or dates & amounts) of any payments
12. Were you required to issue any 1099 Forms? (Contact us if you are unsure)
13. Did you issue the required 1099 Forms? (Through Credo or any other source)
14. I received 1099s
  - If yes, please upload the 1099s

## Part IV. Additional Information:

### Yes No/Not Applicable

1. Do you have vehicle(s) you are using in your business?
  - a. If YES, complete the 2021 BUSINESS USE OF VEHICLES FORM in your Onvio portal.
2. Do you have a home office?
  - a. If YES, complete the 2021 HOME OFFICE FORM in your Onvio portal. This is optional.
3. Do you have rental properties?
  - a. If YES, provide income & expenses or complete the 2021 RENTAL PROPERTY P&L in your Onvio portal.