



Taylor Hill  
Enrolled Agent: 00134684-EA | LTC 35289-C  
22455 SW Oak St. | Sherwood | OR | 97140  
Phone 503.679.0965 | Fax 877-868-3810

## What You Want in 2022

At Hill Tax, Payroll & Bookkeeping we want to help you achieve the goals that are important to you. By answering the following questions, we will be able to understand your unique situation better (this is not required to be completed). We look forward to being your Business & Tax Partner.

Please tell us 3 things you would like to accomplish in 2022 to improve your business situation.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

Please share 3 things that you would like Hill Tax to do to help you accomplish the above in 2022.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_



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### Current Company Information

\* Please make additional copies of this form and fill out separately for each company.  
\* If we have prepared your Business Income Tax Returns previously, please ONLY provide any information below that may have changed over the past year- Thankyou.

Company Name: \_\_\_\_\_

Contact Name(s): \_\_\_\_\_

Physical Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Phone numbers: Home: \_\_\_\_\_ Cell: \_\_\_\_\_

Business: \_\_\_\_\_ Fax: \_\_\_\_\_

Email Address: \_\_\_\_\_

Business Start Date: \_\_\_\_\_ Federal EIN: \_\_\_\_\_

Type of Entity: Partnership (1065)  S Corporation (1120S)

Manager: \_\_\_\_\_ DOB: \_\_\_\_\_ SS#: \_\_\_\_\_ DL#: \_\_\_\_\_

Manager: \_\_\_\_\_ DOB: \_\_\_\_\_ SS#: \_\_\_\_\_ DL#: \_\_\_\_\_

President: \_\_\_\_\_ DOB: \_\_\_\_\_ SS #: \_\_\_\_\_ DL #: \_\_\_\_\_

Vice President: \_\_\_\_\_ DOB: \_\_\_\_\_ SS #: \_\_\_\_\_ DL #: \_\_\_\_\_

Secretary: \_\_\_\_\_ DOB: \_\_\_\_\_ SS #: \_\_\_\_\_ DL #: \_\_\_\_\_

Treasurer: \_\_\_\_\_ DOB: \_\_\_\_\_ SS #: \_\_\_\_\_ DL #: \_\_\_\_\_

Additional information that we need to discuss regarding changes in ownership or states in which you were doing business over the past year and since filing your last tax returns:

\_\_\_\_\_



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## **Items needed for 2021 Business Income Tax Return**

Please provide **photocopies** of the following information for us to complete your 2021 Income Tax Return. **Please do not send the originals to us.** We ask that you retain the originals in a safe place in your possession in case questions arise or further information is needed from them in the future.

- 1) Financial Statements (Income Statement and Balance Sheet) as of December 31, 2021. These statements should tie to your beginning balances as of January 1, 2021, and your last year's tax return if one was filed. Also, all of your bank statements should be reconciled and your bank balances accurate as of December 31, 2021. If you are unable to provide this information our accounting staff is willing and able to assist with this process. Please be aware, though, that there are additional charges incurred for these bookkeeping services and will extend the timeline of completion.
- 2) Any closing statements (HUD-1) for real estate and rental properties purchased during the year.
- 3) Interest statements and mortgage balances for any loans as of December 31, 2021. Please include escrow account activity and balances.
- 4) Beginning balance, interest rate, term, and payment amount for any other loans your business has and the assets that are associated with them.
- 5) Please note any changes in business address, business ownership, address changes on present owners and contact information.
- 6) Property management statements regarding income and expenses in connection with your rental properties.
- 7) Complete information on any assets purchased or sold during the year of 2021.
- 8) If your business was formed prior to 2021 and we did not prepare your 2020 business tax return(s) please provide a copy of the last two years returns (2019 & 2020).
- 9) A signed engagement letter and a client information form. We cannot begin processing your information until all of the information in item nine is received.
- 10) If this is your first year working with us, please send copies of Legal Documents; including the Stamped Articles and Operating Agreement, disclosing owners and percentage of ownership, IRS EIN Letter, and S-Election/2553 if applicable.

Just for informational purposes, if you are using QuickBooks as your accounting software program, we would recommend that you create an accountant copy of the file and e-mail or send a copy of that file with your records to our office. This may save some potential questions we may have on the other information that you provide us.

Thank you for allowing us to assist you in this process.