



Ryan C. Blair, CPA, PLLC
Taxes • Bookkeeping • Advising

2025 Business Tax Return Client Packet

Thank you for choosing us to prepare your 2025 tax return. This organizer packet is designed to help you provide the information we need clearly, accurately, and efficiently. Completing these forms carefully helps reduce follow-up questions and allows us to prepare your return as quickly as possible.

How to Complete the Forms

1. Answer YES / NO questions first
2. If you answer YES, complete the follow-up details
3. Provide YEAR TOTALS, not monthly amounts
4. Attach supporting documents when available
5. Submit all documents together, not one at a time

How to Submit

- Upload via our secure Taxdome client portal
- Drop off documents at our office (by appointment)



If you have questions while completing this packet,
please contact our office at 828-264-5500.

*Scan Here to Book
Drop Off Appointment*

Final Reminder Checklist

- Engagement Letter must be signed before work can begin
- Incomplete packets may delay preparation

Thank you for your cooperation. We appreciate the opportunity to serve you!

SECTION 1: CONTACT INFORMATION

BUSINESS NAME: _____ **BUSINESS CONTACT:** _____

PREFERRED METHOD OF CONTACT (CIRCLE ONE): PHONE CALL EMAIL TEXT

SECTION 2: BUSINESS TAX RETURN QUESTIONNAIRE

Check off YES or NO for each question below:

<input type="checkbox"/>	YES	<input type="checkbox"/>	NO	Did you electronically sign your Business Tax Return Engagement Letter?
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<input type="checkbox"/>	YES	<input type="checkbox"/>	NO	Were there any significant changes to your business? <i>If YES, please explain below.</i>
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Explain:

<input type="checkbox"/>	YES	<input type="checkbox"/>	NO	Did your business address change since last year's return was filed? <i>If YES, provide new address below.</i>
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NEW ADDRESS:	APT #:	
CITY:	STATE:	ZIP:

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Was there a change in ownership? <i>If YES, provide the new owner's name, social security number, mailing address, change in ownership percentage, and the date of change.</i>
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<input type="checkbox"/>	YES	<input type="checkbox"/>	NO	Did your business sell or exchange any property or assets? <i>If YES, provide a description of assets sold or exchanged, the date it was sold, and the amount it was sold for.</i>
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<input type="checkbox"/>	YES	<input type="checkbox"/>	NO	Did your business receive or sell, exchange, gift or otherwise dispose of a digital asset or a financial interest in a digital asset?
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Please continue the questionnaire by flipping over to the back of this page:

	YES		NO	<p>Did your business restructure current debt or take on any new debts during the year? <i>If YES, provide an explanation of any new or restructured debt your business had during the year.</i></p>
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	YES		NO	<p>Did your business receive any correspondence from the IRS or other taxing authorities during the year? <i>If YES, please provide us with a copy.</i></p>
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	YES		NO	<p>Did you MAKE any payments that would require you to file Form(s) 1099?</p>
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	YES		NO	<p>Did your business RECEIVE any Form 1099(s) for non-employee compensation (1099-NEC), interest (1099-INT), dividends (1099-DIV), reportable payment transactions made through a payment card or third-party payment network (1099-K), or miscellaneous income (1099-MISC)? <i>If YES, please provide us with copies.</i></p>
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	YES		NO	<p>Did your business make any payments to foreign persons that would require filing an annual withholding tax return (Forms 1042 and 1042-S)?</p>
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	YES		NO	<p>Did your business conduct services or provide goods outside of your home state? <i>If YES, please provide an explanation of the services your business provided or goods you sold outside of your home state.</i></p>
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	YES		NO	<p>Did your business employ anyone outside of your home state? <i>If YES, list the state(s) in which you had employee(s) located outside of your home state.</i></p>
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	YES		NO	<p>Did your business employ anyone outside of your home state? <i>If YES, list the state(s) in which you had employee(s) located outside of your home state.</i></p>
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Estimated Payment Amount:

Estimated Payment Date:
