

2023

## Questionnaire

Organization Name:

EIN:

## Questionnaire

## General Information

Yes No

- Is this the organization's first year filing as an exempt organization?
- Has the organization provided the IRS determination letter for exempt status?  
If "No," attach the determination letter.
- Has the organization ever received notice of revocation of the exempt status?
- Did the organization have a change of address during the tax year?
- Did the organization's name change during the tax year?
- Did the organization have a change of responsible party during the tax year?
- Did the organization have unrelated business income from an unrelated trade or business?
- Did the organization pay premiums for employee health insurance coverage?
- Did the organization receive any Forms 2439, Notice to Shareholder of Undistributed Long-Term Capital Gains?
- Does the organization qualify to use elective pay for the applicable clean energy credits?
- Did the organization receive a cash payment or digital asset of more than \$10,000 in one transaction or two or more related transactions during the tax year?  
If "Yes," was Form 8300, Report of Cash Payments over \$10,000 Received in Trade or Business, filed?
- Is this the organization's final year?

## Income, Purchases, and Sales

Yes No

- Did the organization purchase any business assets or property during the tax year?  
If "Yes," provide the cost of the asset, the date it was placed in service, and business use percentage.
- Did the organization sell any business assets or property during the tax year?  
If "Yes," provide the amount of proceeds from the sale, the date the asset was sold, and any costs associated with the sale.
- Did the organization buy or sell any stocks, bonds, or other investments during the tax year?
- Did the organization receive or accrue tax-exempt interest during the tax year?  
If "Yes," enter the amount. \_\_\_\_\_

## Deductions and Payments

Yes No

- Did the organization contribute to or for the use of charitable and governmental organizations during the tax year?  
If "Yes," enter the contribution amount. \_\_\_\_\_
- Did the organization have any charitable contributions that were not used from the prior year?  
If "Yes," enter the unused amount. \_\_\_\_\_
- Did the organization have any Net Operating Losses (NOL) beginning before January 1, 2018?  
If "Yes," enter the carryover amount. \_\_\_\_\_
- Does the organization have any backup withholding during the tax year?
- Did the organization purchase gasoline, diesel, or specific fuels for off-road business use?

## Foreign Tax Information

Yes No

- Did the organization have a financial interest in, or a signature or other authority over, a financial account or asset in a foreign country?  
If "Yes," enter name of foreign country. \_\_\_\_\_
- Did the organization receive a distribution from, or was it a grantor of, or transferor to, a foreign trust?
- Did the aggregate value of the organization's foreign accounts exceed \$10,000 at any time during the tax year?
- Did the organization have any income from, or pay taxes to, a foreign country?

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- Did the organization have ownership in a foreign corporation?  
  Did the organization own property in a foreign country?  
  Did the organization receive a Schedule K-3 from a partnership or S corporation?

## Refund, Withholding, and Estimated Tax Information

Yes No

- Did the organization make any estimated payments toward your 2023 taxes?  
  If the organization has an overpayment of 2023 taxes, does it want the refund applied to 2024 estimated taxes?  
  Does the organization want to have any balance due directly withdrawn from the organization's bank account?  
     If "Yes," provide a canceled checking or savings slip.  
  Does the organization anticipate any income or withholdings to be different for 2024?

## Miscellaneous Information

Yes No

- Has the organization received any notices from the IRS or state taxing authority?  
     If "Yes," explain. \_\_\_\_\_  
  May the IRS discuss the tax return with the organization's preparer?  
  Did the organization make any purchases subject to use tax during the tax year?  
     If "Yes," provide use tax returns filed in any state and details of any unpaid use tax.  
  Would the organization like a copy of the tax return sent electronically instead of receiving a printed copy?