Murray & Mensch, P.C.

NEW CLIENT PROFILE

Company Name ______________________________

Date ______________________________

Contact Person ______________________________

Other Contact Name ____________________

Title ______________________________

Title ______________________________

Mailing Address ______________________________

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Phone # (office) ____________________

Phone # (home) ____________________

E-mail Address ______________________________

Fax # ______________________________

Business Entity Type ______________________________

Principal Business Activity ______________

EIN# ______________________________

How did you hear of our firm?

- Referred by ____________________
- Yellow pages ____________________
- Received letter from our firm __________
- Other ______________________________

Other services you may be interested in:

- Business accounting or start up consulting
- Estate planning/Estate Tax Return
- Individual tax planning
- Corporate accounting / tax work
- Other ______________________________

Additional questions or comments?

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INFORMATION NEEDED FOR CORPORATE/PARTNERSHIP TAX RETURNS

1) Prior year tax return(s) filed including depreciation schedules
2) Financial Statements provided to you by your prior accountant for prior or current years
3) Any correspondence received from the Internal Revenue Service or state Taxing authorities
4) Corporate/partnership documents which provide information related to partners or shareholders percentages or identification numbers
5) Accounting records for tax year (If your accounting records are located in QuickBooks, please provide a back-up disk of the data after the December bank statements(s) have been reconciled. Please provide the user name and password for the administrator.)
6) Bank statements for all business bank accounts showing balance as of last month in fiscal year
7) Payroll reports filed for the tax year (if applicable)
8) State Sales tax reports files (if applicable)
9) List of new assets purchased during tax year including date placed in service, cost and description of asset
10) Loan balance/interest paid statements from financial institutions (if applicable)
11) Retirement plan information (if applicable)
12) Credit card statements showing balances due as of year end (if applicable)
13) Closing or settlement statements or similar documents for sales or purchases of major business assets, such as automobiles, goodwill, real property

Entity Name________________________________

US Forms 1065, 1120, & 1120S
2017 Miscellaneous Questions

Please read through these questions and identify any that pertain to your business entity tax return for 2017. Provide additional information as indicated. Tax return deadlines are posted on our website at http://mm-taxcpa.com/tax-deadlines/

Yes No Did the business address change since the 2016 tax return was filed? If yes, provide new address.

Yes No Did any of the owners' addresses change since the 2016 tax return was filed? If yes, provide new addresses.

Yes No Were there any changes in ownership during the tax year? If so, please provide documentation.

Yes No Did you sell, or otherwise dispose of any business assets? If so, please provide details regarding the disposition including date & amount received. See asset listing enclosed.

Yes No Did you purchase any business assets costing more than $500? If the purchase cost more than $5,000, please provide copies of receipts.

Yes No Was there a distribution of property (other than cash) during the year? If yes, provide details.

Yes No Did the business provide a vehicle to any employees or owners available for personal use? If so please complete Auto Vehicle Information Sheet?

Yes No Did any employees or owners use their personal vehicles for business?

Yes No Did you pay for major medical health insurance on behalf of your employees?

Yes No Did you make any payments in 2017 that would require you to file Form(s) 1099?

Yes No If required to file Form(s) 1099, did you or will you fill ALL required Form(s) 1099?

Yes No Do you have or are you interested in establishing a retirement plan, if eligible?

Yes No Do you plan to extend the filing of your business tax return in order to fund a retirement plan?

Yes No Do you have substantiation for all business deductions?

Yes No Do you prefer to paper file instead of e-filing you federal return?

Yes No Do you want us to prepare the annual Texas Franchise Annual Report?

Yes No Do you want us to prepare your annual Property Tax Rendition Report for the CAD?

Entity Name______________________________

Yes No For the Property Tax Rendition Report: Did you sell, or otherwise dispose of any business assets? If yes, please provide details on the enclosed asset listing.

Yes No Do you have nexus (a physical presence) in another state? If yes, please provide the state(s).

Yes No If you have nexus in another state, do you want us to prepare the state income tax return?

Yes No Do you have any foreign accounts and/or foreign transactions?

Yes No Were you notified by either the Internal Revenue Service or a state taxing agency? If yes, explain.

Yes No Do you want a paper copy of your business return in addition to the electronic copy?

E-mail address for e-filing procedures: ____

Best Contact Phone Number: ____

Completed by:______________________________________ Date:________________________________

AUTO VEHICLE INFORMATION
2017

In order to calculate vehicle expense deductions and comply with Section 280F of the Internal Revenue Code, I declare the following information to be true and correct concerning the use of a company provided vehicle or personal vehicle used for business purposes.

		AUTO #1	AUTO #2
1. Total miles driven during the year	+	_________	_________
2. Less total commuting miles driven during the year (____ x ____days)	-	__________	__________
3. Less total other personal (non-commuting) miles driven during the year	-	_________	__________
4. Total business miles driven during the year	=	_________	_________

If this is the first year you are claiming expenses for a particular vehicle, please provide the following:

	AUTO #1	AUTO #2
Date first used in business	_________	_________
Original cost	_________	_________

I certify that I have sufficient written evidence to support the above.

___________________________________ ___________________

Signed Date

Note: If you are claiming auto expenses or a mileage deduction, this form must be completed.

Murray & Mensch, P.C.
Certified Public Accountants

BACKGROUND OF FIRM:

-- Founded by Pat Murray, began as Patrick L. Murray, P.C. in 1986
--Originally located in First Bank of Texas Bldg., followed by 20 years in Paloduro Park Bldg.
--Name changed to Murray & Mensch, P.C. in 2013
--Moved to current location in Summit Park Bldg. in January, 2018

BACKGROUND OF OWNER: KAREN MENSCH

--Born and raised in Gilmer, TX. Graduated Salutatorian of Gilmer H. S.
--Graduated with academic distinction from East Texas State University with a Bachelor of Science with majors in math and English
--Started working for Patrick L. Murray, P.C. in 1997
--Graduated with 4.0 GPA from Texas A&M University-Commerce with a Master of Science with a major in accounting
--Received Certified Public Accountant certificate in August, 2012
--Obtained minority ownership in January, 2010
--Obtained 100% ownership July 1, 2015

PERSONAL STATUS

--Married for 38 years.
--3 adult sons, 2 daughters-in-law, 4 grandchildren
--Active in Crosspoint Church, McKinney

CURRENT STAFF:

Karen Helms, CPA, 32 years business experience, 28 years with M&M,PC

Doris Mullet, professional staff, 24 years business experience, 19 years with M&M,PC

Carolyn Fleming, senior staff, 47 years business experience, 18 years with M&M,PC

Mark Van De Veer, senior staff, 33 years business experience, 13 years with M&M,PC

Susan Pierce, professional staff, 30 years business experience, 12 years with M&M,PC

Jessica Mensch, administrative assistant, 13 years business experience, 7 years with M&M,PC

Terri Phillips, office administrator, 24 years business experience, 6 years with M&M,PC

Kelley Tate, professional staff, 35 years business experience, 6 years with M&M,PC

Kim Smith, professional staff, 26 years business experience, 3 years with M&M,PC

Amy Lindahl, professional staff, 19 years business experience, 2 years with M&M,PC

Michelle Wright, professional staff, 27 years business experience, new with M&M,PC

REFERENCES: Provided upon request.

www.mm-taxcpa.com
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