

MURRAY, MENSCH & BROOKS, P.C.

NEW BUSINESS CLIENT PROFILE

Company Name _____

Date _____

Contact Person _____

Other Contact Name _____

Title _____

Title _____

Mailing Address _____

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?

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
2023 Miscellaneous Questions**

Please read through these questions and identify any that pertain to your business entity tax return for 2023. Provide additional information as indicated. Tax return deadlines are posted on our website at www.mmbtaxcpa.com.

Ownership Information:

- Yes No Did the business address change since the 2022 tax return was filed? If yes, please provide new address.
- Yes No Did any of the owners' addresses change since the 2022 tax return was filed? If yes, please provide new addresses.
- Yes No Were there any changes in ownership during the tax year? If yes, please provide documentation.
- Yes No Were there any changes to the company agreement? If yes, please provide documentation.

Business Operations:

- Yes No Did you sell, or otherwise dispose of any business assets? If yes, 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 Did the business take out a loan or other financing arrangements this year? If yes, please provide documentation.
- 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 yes, please complete the Auto Vehicle Information Sheet?
- Yes No Did any employees or owners use their personal vehicles for business?
- Yes No Were any entertainment, amusement or recreation expenses included with meals? If yes, please provide details.
- Yes No Did you pay for major medical health insurance on behalf of your employees?
- Yes No Do you have substantiation for all business deductions?
- Yes No Were there any significant changes in the entity's business or operations during the year? If yes, please explain.

Briefly describe the company activity _____

Entity Name _____

Other Filing Requirements:

- Yes No Did you make any payments in 2023 that would require you to file Form(s) 1099?
- Yes No If required to file Form(s) 1099, did you or will you file ALL required Form(s) 1099?
- Yes No Do you want us to prepare the annual Texas Franchise Annual Report? Unless previously provided, we must have the web-file number provided to you by the Texas Comptroller's Office to file this report. You should receive this "XT" number by email or regular mail in early 2024.
- Yes No Do you want us to prepare the Beneficial Ownership Information Report? If yes, we will provide a separate questionnaire with the information needed.
- Yes No Does your business qualify as a new veteran-owned business according to Texas Comptroller's Office?
- Yes No Do you want us to prepare your annual Property Tax Rendition Report for the CAD?
- 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 Did you have any sales or other exchanges of virtual currencies (including from an airdrop or hard fork), or used virtual currencies to pay for goods or services?

Tax Year 2023 Specific Questions:

- Yes No Did you receive or expect to receive a credit for the employee retention credit under the provisions of the CARES Act for a prior year? If so, please provide details?

Miscellaneous Questions:

- 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 prefer to paper file instead of e-filing your federal return?
- 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?

Entity Name _____

E-mail address for e-filing procedures: _____

Individual(s) authorized to receive electronic copy of tax return: _____

Best Contact Phone Number: _____

Completed by: _____ Date: _____

Additional Partnership Questions:

If the IRS should make changes to the tax return, the centralized partnership audit regime allows the IRS to tax the partnership at 37% for changes instead of allocating changes to each of the partners. When eligible, we generally recommend opting to elect out of this treatment.

Yes No If eligible, do you want to elect out of centralized partnership audit regime?

Name of Partnership Representative (PR)? _____

The PR must be an individual authorized by Partnership to address any IRS matters.

AUTO VEHICLE INFORMATION
2023

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
Vehicle Make and Model		_____	_____
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.



MMB

MURRAY, MENSCH & BROOKS, P.C.
CERTIFIED PUBLIC ACCOUNTANTS

BACKGROUND OF FIRM:

- Founded by Pat Murray, began as Patrick L. Murray, P.C. in 1986
- Name changed to Murray & Mensch, P.C. in 2013
- Moved to current location in Summit Park Bldg. in January, 2018
- Name changed to Murray, Mensch & Brooks, P.C. in 2024

BACKGROUND OF OWNER: KAREN MENSCH

- Born and raised in Gilmer, TX. Graduated Salutatorian of Gilmer H.S.
- 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
- Obtained ownership in January, 2010

PERSONAL STATUS

- Married for 44 years.
- 3 adult sons, 2 daughters-in-law, 4 grandchildren
- Active in Crosspoint Church, McKinney

BACKGROUND OF OWNER: GRAHAM BROOKS

- Born in Waco, TX and raised in Houston, TX. Graduated from Stratford H.S.
- Graduated from Baylor University with BBA major in Accounting in 2012
- Graduated from Baylor University with Master of Taxation in 2013
- Worked for 10 years at Pannell Kerr Forster of Texas, P.C., Houston
- Started working as a new owner for Murray & Mensch, P.C. in 2023

PERSONAL STATUS

- Married for 10 years to Abigail Brooks
- Daughter, Josie and son, Thomas
- Active in Cadence Church, Frisco

CURRENT STAFF:

- Karen Helms, CPA, 38 years business experience, 34 years with MMB, PC
- Mark Van De Veer, manager, 39 years business experience, 19 years with MMB, PC
- Jessica Mensch, administrative assistant, 19 years business experience, 13 years with MMB, PC
- Kim Smith, senior associate, 32 years business experience, 9 years with MMB, PC
- Susan Scottow, office administrator, 18 years business experience, 3 years with MMB, PC
- Alex Mier, associate, 21 years business experience, 1 year with MMB, PC
- Judith Zuniga, associate, 10 years business experience, 1 year with MMB, PC
- Brian Marterella, associate, 31 years business experience, new with MMB, PC

REFERENCES: Provided upon request.

www.mmbtaxcpa.com

2150 S. Central Expy, Suite 250 McKinney, TX 75070 (972)562-2100 Fax (972)547-6165