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?

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Professionalism with Christian care and concern for people

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
2024 Miscellaneous Questions

Please read through these questions and identify any that pertain to your business entity tax return for 2024. Provide additional information as indicated. Tax return deadlines are posted on our website at www.mmbtaxcpa.com/tax-deadlines/.

Ownership Information:

Yes No Did the business address change since the 2023 tax return was filed? If yes, please provide new address.

Yes No Did any of the owners' addresses change since the 2023 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 2024 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 2025.

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 2024 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
2024

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.

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

BACKGROUND OF MANAGING PARTNER: GRAHAM BROOKS

--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
--Obtained partnership at Murray & Mensch, P.C. in January 2023

PERSONAL STATUS

--Married for 11 years to Abigail Brooks
--Daughter, Josie and son, Thomas
--Active in Cadence Church, Frisco

BACKGROUND OF PARTNER: KAREN MENSCH

--Graduated from Texas A&M University-Commerce with a Master of Accountancy in 2011
-- Started working for Patrick L. Murray, P.C. in 1997
--Obtained partnership at Murray & Mensch, P.C. in January 2010

BACKGROUND OF DIRECTOR: RICHARD DAVIS

--Graduated from University of Houston with BBA major in Accounting in 2016
--Graduated from University of Houston with Master of Accountancy in 2017
--Worked for 6 years at Pannell Kerr Forster of Texas, P.C., Houston
--Worked for 2 years in entertainment industry advising actors, film producers, and athletes
--Started working for Murray, Mensch & Brooks, P.C. in January 2025

BACKGROUND OF DIRECTOR: CARSON BOONE

--Graduated from University of Texas - Dallas with BBA in Accounting in 2017
--Started career at PricewaterhouseCoopers - Dallas. Worked Corporate FP&A for energy and manufacturing industries.
--Joined Murray, Mensch, & Brooks, P.C. in December 2024, offering Fractional CFO Services.

CURRENT STAFF:

Mark Van De Veer, manager, 40 years business experience, 20 years with MMB, PC

Paul Allen, manager, 19 years business experience, new with MMB, PC

Kim Smith, senior associate, 33 years business experience, 10 years with MMB, PC

Alex Mier, associate, 22 years business experience, 2 years with MMB, PC

Judith Zuniga, associate, 11 years business experience, 2 years with MMB, PC

Jordan Spaethe, associate, 4 years business experience, new with MMB, PC

Susan Scottow, office administrator, 19 years business experience, 4 years with MMB, PC

Jessica Mensch, administrative assistant, 20 years business experience, 15 years with MMB, PC

REFERENCES: Provided upon request.

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