

**Hancock Askew & Co. LLP**  
**442 W Kennedy Blvd Ste 390**  
**Tampa, FL 33606-1495**  
**813-254-2727**

Dear Business Client:

The Business Organizer is designed to help you gather the information needed to prepare your 2018 partnership return.

The Questionnaire asks about pertinent items necessary for preparing the most accurate return possible. Please answer all applicable questions and attach a statement when necessary for additional information not provided in the Questionnaire.

If you would like to discuss the information in your completed Business Organizer or the preparation of your 2018 partnership return, please call our office for an appointment.

Thank you for the opportunity to serve you.

Sincerely,

Hancock Askew & Co. LLP

# Questions

## Partnership Preparation Checklist and Questionnaire.

Please check the appropriate box and include all necessary details and documentation.

Yes No

### Preparation Checklist

- |                                                                                                                                            |                          |                          |
|--------------------------------------------------------------------------------------------------------------------------------------------|--------------------------|--------------------------|
| Sign and return the partnership Engagement Letter.                                                                                         | <input type="checkbox"/> | <input type="checkbox"/> |
| Sign and return the partnership Consent Letter.                                                                                            | <input type="checkbox"/> | <input type="checkbox"/> |
| Provide any oral or written amendments to the partnership agreement or operating agreement.                                                | <input type="checkbox"/> | <input type="checkbox"/> |
| Provide copies of correspondence with tax authorities regarding changes to prior year(s) returns, if not already provided during the year. | <input type="checkbox"/> | <input type="checkbox"/> |

### Partnership Information

- |                                                                                                                                                                                                                                             |                          |                          |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------|--------------------------|
| Did the partnership's address change from last year?<br>If yes, please explain: _____                                                                                                                                                       | <input type="checkbox"/> | <input type="checkbox"/> |
| Did the partnership representative or designated individual (if representative is not a person) address or contact information change from last year?<br>If yes, please explain: _____                                                      | <input type="checkbox"/> | <input type="checkbox"/> |
| Did the partnership change any bank accounts used for financial transactions during the tax year? If yes, please contact our office. Do not indicate the bank account change on your Business Organizer.                                    | <input type="checkbox"/> | <input type="checkbox"/> |
| Did the partnership make any payments of rents, commissions, or other fixed or determinable income totaling \$600 or more to any one person during the year?<br>If yes, did the partnership file, or will it file, all required Forms 1099? | <input type="checkbox"/> | <input type="checkbox"/> |
| If the partnership maintains inventory, was there a change in the method of determining quantities, cost, or valuations between opening and closing inventory during the year?<br>If yes, please explain: _____                             | <input type="checkbox"/> | <input type="checkbox"/> |

### Partner Information

- |                                                                                                                                                                                                                                                            |                          |                          |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------|--------------------------|
| Were there any changes to the partners' general information, for example, address changes?<br>If yes, please explain: _____                                                                                                                                | <input type="checkbox"/> | <input type="checkbox"/> |
| Did any new partners join the partnership or any previously existing partners leave the partnership?<br>If yes, please explain: _____                                                                                                                      | <input type="checkbox"/> | <input type="checkbox"/> |
| Did a partner sell or exchange any or all of their partnership interest in exchange for unrealized receivables (such as proceeds, services, or property where the partnership has a right to payment) or inventory items?<br>If yes, please explain: _____ | <input type="checkbox"/> | <input type="checkbox"/> |
| Did any partner transfer any capital to an existing or new partner, including any transfers for recently deceased partners?<br>If yes, please explain: _____                                                                                               | <input type="checkbox"/> | <input type="checkbox"/> |
| Did any partner contribute cash or property to the partnership or take a cash distribution during the year?<br>If yes, please explain: _____                                                                                                               | <input type="checkbox"/> | <input type="checkbox"/> |
| Are any of the partners a foreign individual, entity, or trust?<br>If yes, please explain: _____                                                                                                                                                           | <input type="checkbox"/> | <input type="checkbox"/> |
| If yes, was any withholding made for the foreign partners?<br>If yes, please explain: _____                                                                                                                                                                | <input type="checkbox"/> | <input type="checkbox"/> |

### Activity, Purchases, Sales, and Income Information

- |                                                                                                                                  |                          |                          |
|----------------------------------------------------------------------------------------------------------------------------------|--------------------------|--------------------------|
| Were there any significant changes in the partnership's business or operations during the year?<br>If yes, please explain: _____ | <input type="checkbox"/> | <input type="checkbox"/> |
| Did the partnership start a new business during the year?<br>If yes, please explain: _____                                       | <input type="checkbox"/> | <input type="checkbox"/> |
| Did the partnership sell an existing business, rental, or any other property during the year?<br>If yes, please explain: _____   | <input type="checkbox"/> | <input type="checkbox"/> |

- Did the partnership sell, exchange, or purchase any real estate during the year?
- If yes, please explain: \_\_\_\_\_
- Did the partnership acquire new or additional interest in another partnership or trust?
- If yes, please explain: \_\_\_\_\_
- Did the partnership distribute any guaranteed payments to a partner (payments or credits to a partner without a regard to the income of the partnership)?
- If yes, please explain: \_\_\_\_\_
- Did the partnership receive interest or dividend income during the year? If so, provide copies of Forms 1099 received reflecting these amounts.
- Did the partnership acquire or dispose of any stock during the year? If so, provide copies of Forms 1099 and any brokerage statements received reflecting these amounts.
- Did the partnership have any debts canceled or forgiven during the year?
- If yes, please explain: \_\_\_\_\_
- Did the partnership receive any income from property sold prior to this year?
- If yes, please explain: \_\_\_\_\_
- Did the partnership incur a casualty or theft loss or any condemnation awards during the year?
- If yes, please explain: \_\_\_\_\_
- Did the partnership make any cash or noncash charitable contributions? If yes, please provide evidence such as a receipt from the donee organization, a canceled check, or record of payment, to substantiate all contributions made.
- Did the partnership pay any health insurance premiums for partners?
- If yes, please explain: \_\_\_\_\_
- Did the partnership make any contributions to a pension or IRA for partners?
- If yes, please explain: \_\_\_\_\_

**Foreign Activity**

- Did the partnership have any foreign income or pay any foreign taxes during the year, directly or indirectly, such as investment accounts or partnerships?
- If yes, please explain: \_\_\_\_\_
- Did the partnership have a financial interest in or signature authority over a financial account such as a bank account, securities account, or brokerage account located in a foreign country?
- If yes, please explain: \_\_\_\_\_
- Does the partnership have any foreign financial accounts, foreign financial assets, or hold interest in a foreign entity?
- If yes, please explain: \_\_\_\_\_