

Updegrove, McDaniel, McMullen & Chiccehitto, PLC
2025 PARTNERSHIP TAX INFORMATION REQUEST LIST(FORM 1065)

Partnership Name: _____

Any changes to contact information: _____

Have all accounts been reconciled? Yes No

Please provide the following information:

Done N/A

1. Activity for 2025 Tax Year. Examples include:
 - a) Comparative 2025-2024 balance sheet and profit and loss statement with a 2025 detailed general ledger of all income/expense accounts,
 - b) QuickBooks desktop accountants' copy file; cut-off date of 1/1/2026, or
 - c) Access to QuickBooks Online (QBO).
QuickBooks file/ access is preferred. If you have questions about this, please contact us.
2. Fixed assets account details and schedule of assets acquired and/or sold, including date acquired or sold and sales or purchase price.
3. Copies of correspondence with tax authorities.
4. If new business client or if any changes, copy of partnership agreement.
5. For each partner, provide SSN, address, percentage of ownership, profit/loss percentage, and general or limited classification. Also provide detail of partnership ownership changes, if any.
6. Provide detail of all partner draws and guaranteed payments. Guaranteed payments to be broken out between those for capital and those for services; provide breakout if applicable.
7. Business License (BPOL) and Personal Property Tax forms, if we are to prepare them.
8. List of states where business is conducted and provide amount of revenue allocated to each.
9. Loan statements showing year-end balance, interest paid, and new borrowings (including partner loans).
10. Schedule of all fringe benefits paid on behalf of partners and indicate which benefits have been included in their guaranteed payments (if not easily identifiable in your QuickBooks or other general ledger format).
11. Copies of Forms 1094, 1095, 1096, 1099, 941, 940, 5500, 1042, W-2s and W-3s that have been filed. Ensure all necessary 1099's are mailed to recipients by filing deadline of January 31, 2026.
12. List of nondeductible expenses, i.e. penalties and entertainment (if not easily identifiable in your QuickBooks or other general ledger format).
13. Information for partnership use of vehicles including: total mileage, business mileage, and personal mileage for each vehicle.
14. List each type of trade, business activity or rental activity, and indicate the date started or acquired.
15. Did you make any state tax payments (such as nonresident withholding or pass-through entity tax on behalf of partners in 2025? If so, provide detail of amounts and dates paid (if not easily identifiable in your QuickBooks or other general ledger format).
16. Did you offer or reimburse health insurance costs to your employees or partners?
17. This corporation qualifies under the domestic filing exception for pass-through entities and is **not** required to file Schedules K-2 and K-3, because it has US partners (members) and no foreign activities.

Yes No