DAVID RAFF & COMPANY
2025 PARTNERSHIP TAX INFO SHEET

Partnership Name _____

Contact Name _____

Preferred ways for us to contact you?

☐ Phone _____

☐ Email _____

Your tax returns will be delivered electronically via Canopy – our secure Client Portal. *

draffco.clientportal.com **** Paper copies are available upon request.***

Your tax documents will be given back after completion. How would you like your them delivered?

☐ No physical documents need to be returned. All materials were submitted digitally or as copies.
☐ Delivery to home? ☐ Delivery to business? ***Signature required for delivery? Yes ☐ No ☐***
☐ Leave for my pickup.
☐ I'll let you know when you contact me.

Yes	***No***	***N/A***	
☐	☐		***If time permits, I would like to review a draft of the tax returns.***
☐	☐		***Will 2025 be the last year a tax return for the partnership will be required?***
☐	☐	☐	***If so, would you like David Raff & Company to prepare dissolution documents?***
☐	☐		***Will David Raff & Company be sending the Schedule K-1s directly to the shareholders? If so, please complete the attached shareholder info sheet.***
☐	☐		***Has the business or any partners changed addresses since the prior year?***
☐	☐	☐	***Have all required Form 1099s for independent contractors and rent to landlords you paid in 2025 been filed?***
☐	☐		***Would you like David Raff & Company to file the statement of information (due annually with the Secretary of State) on your behalf?***
☐	☐		***Provide the number of 2025 Form W2s issued. Enter 0 if none. _____***