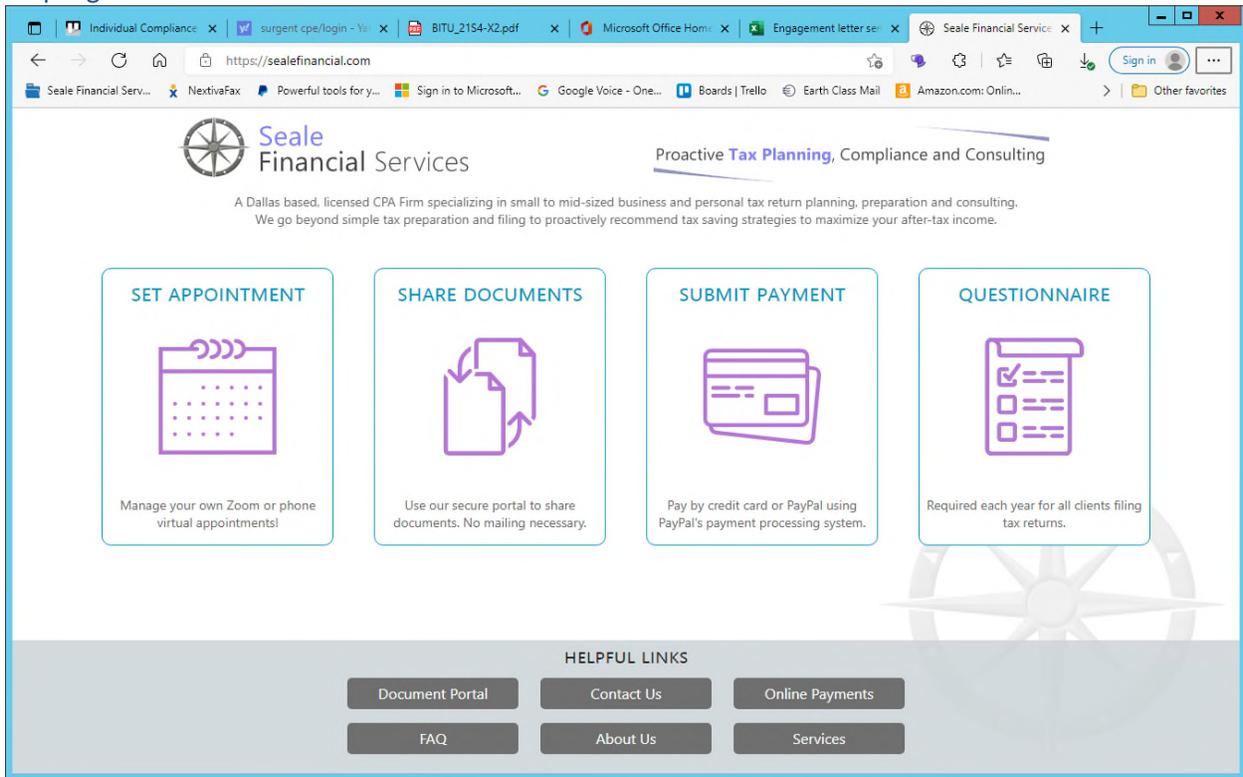
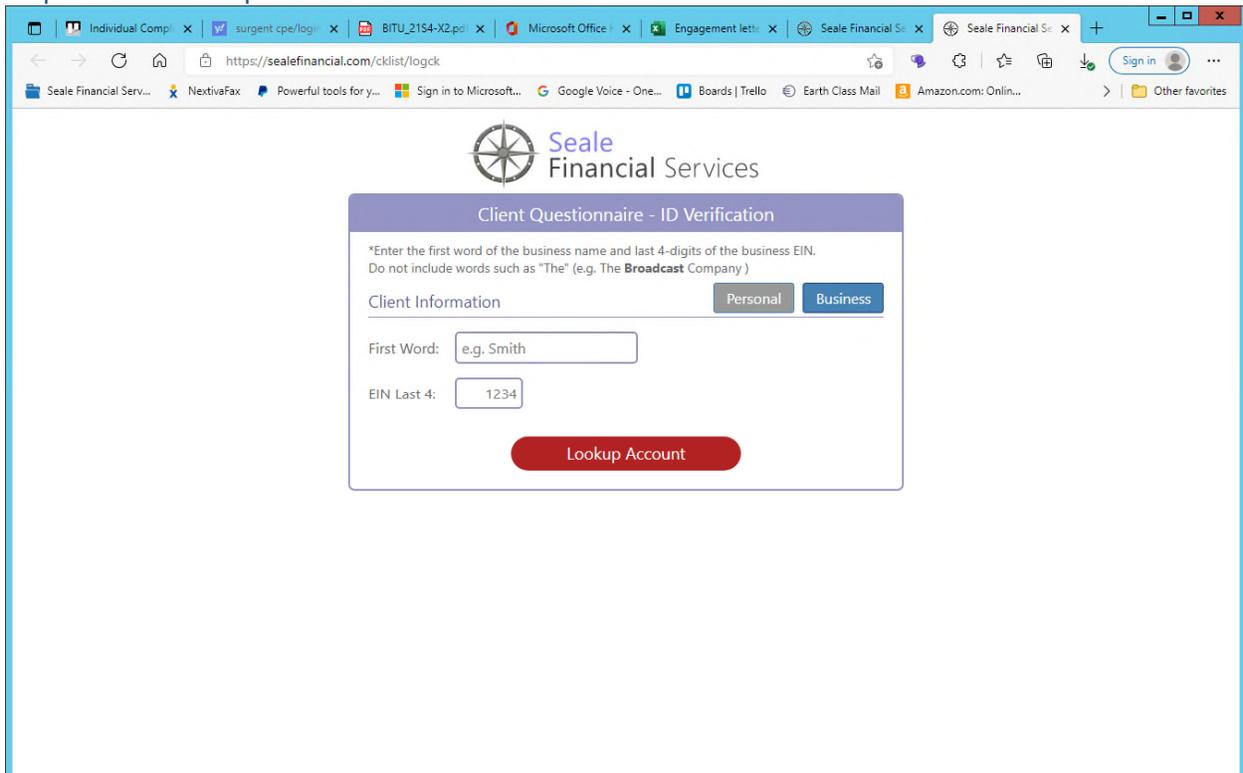


I wanted to provide instructions on completing the questionnaire. Please keep this handy for when you are ready to complete that. If you also have a personal return, there is a questionnaire for that. The steps are the same except you want the personal button to be blue in step 2. If you need assistance or are unable to access your questionnaire after following these instructions, please let us know.

Step 1 go here:



Step 2: click on the questionnaire icon – be sure the business button is blue



Step 3 – enter the information for prompts and click look up account

Individual Comp... x | surgent.cpe/logi... x | BITU_2154-X2.po... x | Microsoft Office... x | Engagement lett... x | Seale Financial Se... x | Seale Financial Se... x | +

https://sealefinancial.com/cklist/logck

Seale Financial Services

Client Questionnaire - ID Verification

*Enter the first word of the business name and last 4-digits of the business EIN.
Do not include words such as "The" (e.g. The **Broadcast** Company)

Client Information Personal Business

First Word:

EIN Last 4:

Send access code to...

--8210

ja***@sealefinancial.com

Send Access Code

Step 4 – choose how to receive an access code and enter it once received

Individual Comp... x | surgent.cpe/logi... x | BITU_2154-X2.po... x | Microsoft Office... x | Engagement lett... x | Seale Financial Se... x | Seale Financial Se... x | +

https://sealefinancial.com/cklist/logck

Seale Financial Services

Client Questionnaire - ID Verification

*Enter the first word of the business name and last 4-digits of the business EIN.
Do not include words such as "The" (e.g. The **Broadcast** Company)

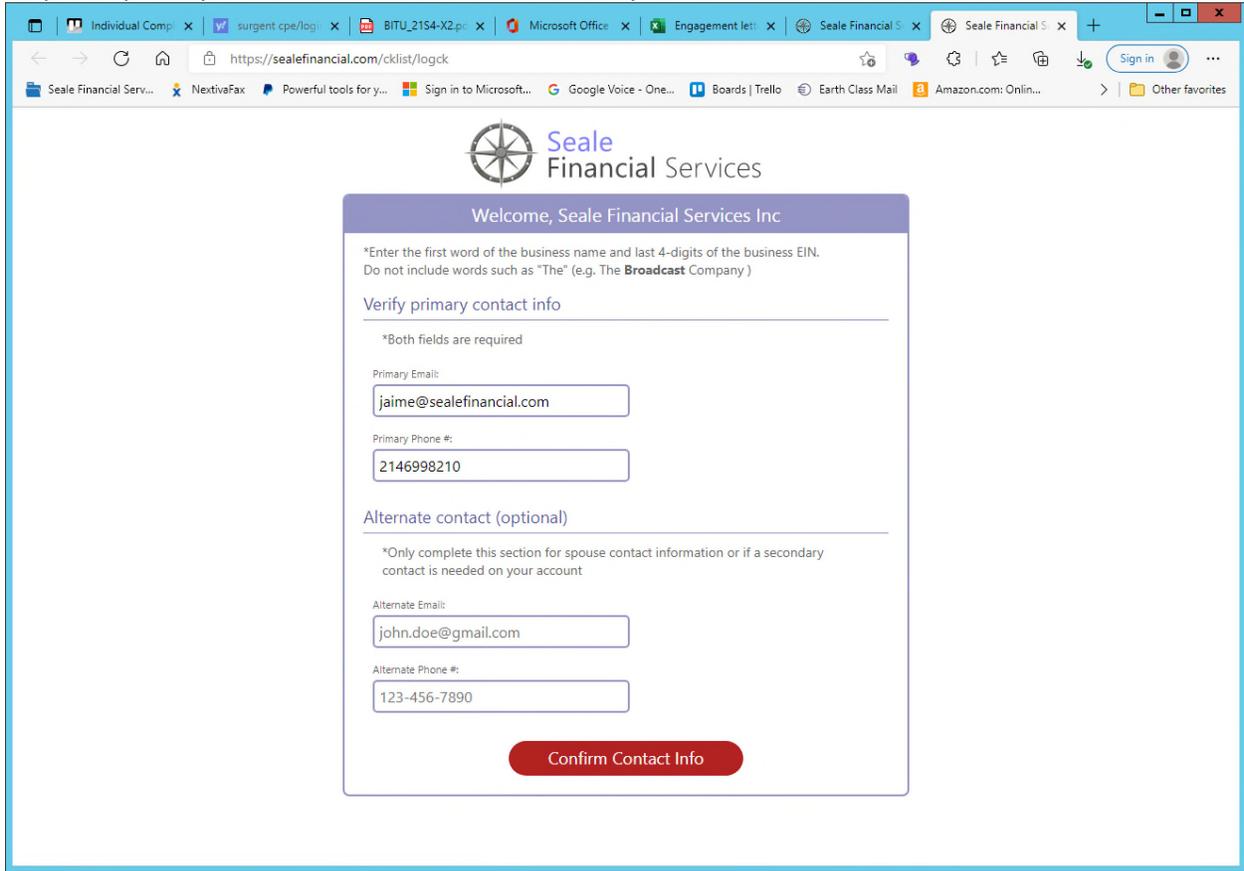
*If you do not receive your code within 5 minutes, you may [request a new code](#)

Enter temporary access code

Access Code:

Verify Access Code

Step 5 – update your contact information if necessary



The screenshot shows a web browser window with the URL <https://sealefinancial.com/cklist/logck>. The page features the Seale Financial Services logo at the top center. Below the logo, a purple header bar reads "Welcome, Seale Financial Services Inc".

The main content area contains the following text and form fields:

*Enter the first word of the business name and last 4-digits of the business EIN.
Do not include words such as "The" (e.g. The **Broadcast** Company)

Verify primary contact info

*Both fields are required

Primary Email:

Primary Phone #:

Alternate contact (optional)

*Only complete this section for spouse contact information or if a secondary contact is needed on your account

Alternate Email:

Alternate Phone #:

At the bottom of the form is a red button labeled "Confirm Contact Info".

Step 6 – complete the questionnaire for the current tax year

The screenshot shows a web browser window with the URL <https://sealefinancial.com/cklist/qlistb>. The page title is "2021 Client Questionnaire" and the company logo "Seale Financial Services" is at the top. A dropdown menu shows "2021". The client name is "Seale Financial Services Inc (7773)". A note says: "*ONLY check those items where your response would be 'YES'".

Miscellaneous Information

- Did you issue form W-2 to employees?
If checked, save transmittal form W-3 to your portal account.
- Did you make any payments that would require filing form 1099-MISC and or 1099-NEC?
If checked, save transmittal form 1096 to your portal account.
- Did you receive a Paycheck Protection Program (PPP) Loan or Economic Injury Disaster Loan (EIDL)?
If checked, save documentation to your portal account.
- Did you make any payments that would require filing form 1099-MISC and or 1099-NEC?
If checked, save documentation to your portal account.

Foreign Tax Information

- Did you have a financial interest in or signature authority over a financial account or asset located in a foreign country?
- Did you receive a distribution from or were you a grantor of, or transferor to, a foreign trust?
- Did the aggregate value of your foreign accounts exceed \$10,000 at any time during the year?
- Did you have any income from, or pay taxes to, a foreign country?
- Did you own property in a foreign country?

*You have (0) questions selected.

[Submit Questionnaire](#)

[Close and Logout](#)

Click on submit questionnaire and you are done.