

Self-Employed Must Complete This Section:

1. How long have you been in business? _____
Brief description of business _____
Where do you conduct business? _____

2. What services do you perform? _____
How much do you charge for them? _____

3. Approximately how many clients do you have? _____
How often do you provide services for each client? _____

4. What types of items do you need to operate? _____
How often are they replenished? _____

5. Do you travel for business? Yes No
How do you keep track of mileage? _____
When and where do you have to travel for business? _____

6. Can you provide any documentation to substantiate your business?
 Business Cards Receipts or Receipt Book (with company header)
 Business Stationery Business/Occupational License (if required)
 Other Tax Returns (sale/excise employment, etc...)
 Advertisements (newspaper, flyer, yellow pages, etc...)
Other _____

7. Who maintains the business records? _____

8. Do you maintain separate banking accounts for personal and business transactions? Yes No
If Yes, in what form were the records provided? _____
If No, how do you differentiate between personal and business transactions and monetary assets?

9. What type of records are you providing the tax preparer to prepare your tax returns?
 Accounting Records Paid Invoices/receipts Log Books
 Computer Records Ledgers Car/Truck Expenses
 Business Bank Accounts Other _____

If none, how did you determine the amount of income? _____
If none, how did you determine the expenses? _____

10. Did you receive a 1099-NEC to support your Income? Yes No
If not, is it reasonable that the business type would not receive Form 1099-NEC? Yes No

11. If no expenses or low expenses, why are the expenses so low? _____

12. If high expenses or overall loss, why are expenses so high? _____

13. If high expenses or loss, how are you able to pay these expenses and keep this business open?

Taxpayer Signature _____ **Date** _____

Spouse Signature _____ **Date** _____