

**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** \_\_\_\_\_