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** _____