

Self Employment Income Information

Name(s) as shown on return

1. How long have you owned your business? _____
Brief description of business _____
Where do you conduct business? _____

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

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 these items 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 Business/occupational license (if required)
 Business stationary Other tax returns (sales/excise, employment, etc.)
 Receipts or receipt book (with company header) Advertisements (newspaper, flyer, yellow pages, etc.)
Other (list any other documentation you can provide to substantiate your business):

7. Who maintains the business records? _____

8. Do you maintain separate banking accounts for personal and business transactions? Yes No
a. If "No," how do you differentiate between personal and business transactions and monetary assets?

9. In what form were business records provided to tax preparer?
 Accounting records Log books
 Paid invoices/receipts Ledgers
 Computer records Business bank accounts
 Car/truck expenses
Other (list any other forms of documentation you can provide to support your business if requested):

10. How did you determine the amount of income? _____
The amount of expense? _____

11. Form 1099-NEC:
a. Do you have any Forms 1099-NEC to support the income? Yes No
b. If not, is it reasonable that the business type would not receive Form 1099-NEC? Yes No