

Taxpayers with self-employment income:

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

<input type="checkbox"/> Business card	<input type="checkbox"/> Business/occupational license (if required)
<input type="checkbox"/> Business stationary	<input type="checkbox"/> Other tax returns (sales/excise, employment, etc.)
<input type="checkbox"/> Receipts or receipt book (with company header)	<input type="checkbox"/> Advertisements (newspaper, flyer, yellow pages etc.)
<input type="checkbox"/> 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 "Yes," what form of records were provided? _____
 b. If "No," how do you differentiate between personal and business transactions and monetary assets? _____
9. Where satisfactory records of income and expense provided? Yes No
 a. If Yes, in what form whre these record?

<input type="checkbox"/> Accounting records	<input type="checkbox"/> Computer records	<input type="checkbox"/> Log books	<input type="checkbox"/> Business bank accounts
<input type="checkbox"/> Paid invoices/receipts	<input type="checkbox"/> Car/truck expenses	<input type="checkbox"/> Ledgers	<input type="checkbox"/> Other: _____

 b. If "No," how did you determine:
 The amount of income? _____ The amount of expense? _____
10. Form 1099-NEC:
 a. Do you have any Forms 1099-NEC to support the income? Yes No
 b. If not, is it resonable that the business type would not receive Form 1099-NEC? Yes No