



# Business Questionnaire

This questionnaire lists the types of records you need for us to prepare your business tax return Form Schedule C. The law requires you to keep adequate records to support business income and expenses.

What Type of Business did you operate during the year?

- Sole Proprietorship/Self-Employed
- Independent Contractor
- Single-Member LLC

Business Owner Name	Social Security Number
Name of Business	EIN (Federal ID Number)
Business Address	Date Started Business
Telephone Number	Business website

1. Provide a description of your business activity (type of work, service provide, product sold)  
\_\_\_\_\_
2. What are your business hours of operation & where do you conduct your business?  
\_\_\_\_\_
3. Do you have a business license? (If so, provide a copy)  Yes  No
4. How do you advertise your business? (Provide copies of receipts or other proof of payment/ads)  
\_\_\_\_\_
5. Did you file state or local sales tax returns? (If yes, provide copies of most recent return)  Yes  No
6. Did you receive form 1099-MISC, 1099-NEC, and 1099-K? (If yes provide copies)  Yes  No
7. Did you receive a PPP Loan after March 31, 2021?  Yes  No  
If Yes, How much: \$ \_\_\_\_\_ Are you a publically traded company?  Yes  No  
Have you experienced a 25% reduction in gross receipts in any quarter in 2020 compared to the comparable quarter in 2019?  Yes  No If yes, what quarter in 2020 compared to 2019? \_\_\_\_\_
8. Provide copies of records to support business income for any income you received that's not included on a form 1099. (Check all boxes that apply)
  - Business Bank Statements or Personal Bank Statements with business income highlighted
  - Financial Accounting Records / Statements from QuickBooks, etc.
  - Electronic Payment Records (Zelle, Cash App, PayPal, etc.)
  - Logbooks / Ledgers / Paid Invoices / Receipts issued to customers
  - Other (Specify): \_\_\_\_\_
9. Provide copies of records to support the business expenses (Check all that apply)
  - Invoices / Receipts / Financial Accounting Statement / Business Bank or Credit Card Statements
  - Rent/Lease/Business Insurance Contracts, Bank/Credit Card Statements with expenses highlighted
  - Electronic payment records (Zelle, Cash App, PayPal, etc. highlighting expenses paid)
  - Mileage log for business miles; Receipts for actual car/truck expenses (gas, insurance, repairs, etc.)
  - Other (Specify): \_\_\_\_\_

I certify under penalty of perjury that the information on this form is true, correct, and complete to the best of my knowledge. I can provide proof of business existence, income, expenses, and all information on this form.

Your Signature: \_\_\_\_\_ Title: \_\_\_\_\_ Date: \_\_\_\_\_