

TAX INTO CASH FORM

INCOME DOCUMENTATION FORM	TAX YEAR:
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Name: _____ Date: _____

How long have you been in business? _____ Is business in your name? _____

Where do you conduct business? _____

Brief description of business: _____

What services do you perform? _____

How much do you charge per client? _____

Approximately how many clients do you have? _____

How often do you service your clients? _____

What types of items do you need to operate? _____

How often do you replenish items? _____

Do you travel for business? Yes or No Did you track your mileage? Yes or No

If you do travel for work, where do you go to and from? _____

Can you provide documentation to substantiate your business? Yes or No

Check all that apply:

- | | |
|---|--|
| <input type="checkbox"/> Business Cards | <input type="checkbox"/> Business/occupational license (if required) |
| <input type="checkbox"/> Business Stationery | <input type="checkbox"/> Other tax returns |
| <input type="checkbox"/> Receipts or receipt book | <input type="checkbox"/> Advertisements (newspaper, flier, yellow pages, etc.) |

Other (list any other documents you can provide to substantiate your business):

Who maintains your business records? _____

Do you maintain separate banking accounts for personal and business transactions? Yes or No

If yes, in what form were the records provided?

If no, how do you differentiate between personal and business transactions?

Do you have records today of proof of income? If so, in what form? (check all that apply with you today)

- | | | | |
|---|--|--|----------------------------------|
| <input type="checkbox"/> Accounting Records | <input type="checkbox"/> Computer Records | <input type="checkbox"/> Logbooks | <input type="checkbox"/> Ledgers |
| <input type="checkbox"/> Paid invoices/receipts | <input type="checkbox"/> Car/Truck Expense | <input type="checkbox"/> Business Bank Account | |

List any other forms of income/expense documentation provided: _____

Do you have any 1099-NEC to support the income? Yes or No

Taxpayer Signature

Spouse Signature (if filing married)