



GBC
WORLDWIDE

TAX PROS

SELF EMPLOYMENT
DUE DILLIGENCE

AUDIT READY TAX SYSTEMS

BUSINESS DESCRIPTION INFORMATION

BUSINESS NAME	
BUSINESS DESCRIPTION	
EIN#	
ANY EMPLOYEES?	
YEARS IN BUSINESS?	

BUSINESS FINANCIAL RECORDS

RECEIPT BOOK		ONLINE PAYMENTS	
EXPENSE RECEIPTS		CAR & TRUCK EXPENSE RECORDS	
COMPUTER RECORDS		CLIENT STATEMENTS	
LEDGERS		INSURANCE	
ADVERTISING		INCOME RECONSTRUCTION	
1099 MISC		PAYPAL TRANSACTION	
ACCOUNTING RECORDS		SQUARE TRANSACTIONS	
LOGBOOKS		CASH APP TRANSACTIONS	
BANK STATEMENTS			
SUPPLIERS			
RENTAL EXPENSES			

BUSINESS OPERATIONS RECORDS

BUSINESS PHONE #	
BUSINESS ADDRESS	
HOW DO YOU ADVERTISE	
BUSINESS SOCIAL MEDIA PAGES	
DO YOU HAVE A BUSINESS LICENSE	
IS YOUR BUSINESS an LLC, S CORP, C CORP, SOLE PROP	
DID YOU FILE STATE & LOCAL SALES & USE TAXES	
HOW DID YOU CALCULATE YOUR INCOME?	
HOW DID YOU CALCULATE YOUR EXPENSES?	
IF THERE ARE NO BUSINESS EXPENSES, CAN YOU EXPLAIN WHY?	

PREPARER NOTES:

BUSINESS OWNER SIGNATURE DATE

TAX PREPARER SIGNATURE DATE
