



Schedule C Business Income Questionnaire

Prepared by Kelsay Advisory Group

A professional checklist for Sole Proprietors to help us prepare your return accurately and efficiently.

Instructions: Please complete this organizer as thoroughly as possible. Leave any item blank if it does not apply to your business.

BUSINESS INFORMATION

Taxpayer Name: _____

Business Name: _____

Principal Business Activity: _____

Business Address: _____

EIN: _____

New business this year Existing business

INCOME

Gross Receipts _____

Returns & Allowances _____

Cost of Goods Sold _____

Beginning / Ending Inventory _____

VEHICLE INFORMATION

Vehicle Description: _____



Business Miles: _____

Personal Miles: _____

Vehicle also used personally

EXPENSE CATEGORIES

Vehicle

| | |
|-----------------|-------|
| Mileage | _____ |
| Fuel | _____ |
| Repairs | _____ |
| Insurance | _____ |
| Parking & Tolls | _____ |
| Car Washes | _____ |

Office

| | |
|------------------|-------|
| Office Rent | _____ |
| Utilities | _____ |
| Telephone | _____ |
| Internet | _____ |
| Office Supplies | _____ |
| Furniture | _____ |
| Technology | _____ |
| Equipment Rental | _____ |
| Cleaning | _____ |
| Repairs | _____ |

Professional

| | |
|---------------------|-------|
| Legal Fees | _____ |
| Accounting/Tax Prep | _____ |
| Business Insurance | _____ |
| Business Interest | _____ |
| Memberships | _____ |
| Subscriptions | _____ |
| Sponsorships | _____ |

Employee



| | |
|-------------------|-------|
| Contract Labor | _____ |
| Employee Benefits | _____ |
| Payroll | _____ |
| Payroll Taxes | _____ |
| Uniforms | _____ |

OTHER EXPENSES

| Description | Amount |
|-------------|--------|
| | |
| | |
| | |



Disclaimer

This questionnaire is provided for informational and organizational purposes only. It is intended to assist in gathering information for the preparation of your tax return and does not constitute professional tax, legal, or accounting advice. Completion of this questionnaire does not establish a client relationship or replace professional consultation. Please contact Kelsay Advisory Group if you have questions regarding your specific tax situation.