

Form E & C	2025 Rental Questionnaire	Yes	No
The IRS requires tax return preparer to complete a due diligence checklist that support the claim for Schedule E			
Who maintain your business records? Name _____			
What type of business records do you keep? (Computer reports/Spreadsheets/Other)			
Did you make any payments in 2025 that would require you to file Form(s) 1099?		<input type="checkbox"/>	<input type="checkbox"/>
If "Yes," did you or will you file required Form(s) 1099?		<input type="checkbox"/>	<input type="checkbox"/>
Did you "materially participate" in the operation of the rental?		<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any 1099-MISC for rent?		<input type="checkbox"/>	<input type="checkbox"/>
Do you keep a separate bank account for the rental?		<input type="checkbox"/>	<input type="checkbox"/>
Do you keep all your business expense documents/records?		<input type="checkbox"/>	<input type="checkbox"/>
2025 Self Employment Business Questionnaire		Yes	No
The IRS requires tax return preparer to complete a due diligence checklist that support the claim for Schedule C			
How long have you had this business? Years _____			
Who maintain your business records? Name _____			
What type of business records do you keep? (Computer reports/Spreadsheets/Other) (Circle one)			
Do you have sales or payroll tax returns/receipts book with company name/business card/advertisements, etc.		<input type="checkbox"/>	<input type="checkbox"/>
Did you make any payments in 2025 that would require you to file Form(s) 1099?		<input type="checkbox"/>	<input type="checkbox"/>
If "Yes," did you or will you file required Form(s) 1099?		<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any 1099-NEC to support your business income?		<input type="checkbox"/>	<input type="checkbox"/>
Did you purchase any fixed assets? Please provide documents if Yes		<input type="checkbox"/>	<input type="checkbox"/>
Do you keep separate bank account for business?		<input type="checkbox"/>	<input type="checkbox"/>
Do you keep all your business expense documents/records?		<input type="checkbox"/>	<input type="checkbox"/>
Did your business make any payments for your Health Insurance, Life insurance, etc?		<input type="checkbox"/>	<input type="checkbox"/>
Did your business pay any rent to you in 2025?		<input type="checkbox"/>	<input type="checkbox"/>
Did your business pay any dues, fees or assessments to country clubs and other social organizations?		<input type="checkbox"/>	<input type="checkbox"/>
Do you have written documentation for mileage expenses?		<input type="checkbox"/>	<input type="checkbox"/>
Can you provide documentation to substantiate eligibility for Schedule C (Business) and/or Schedule F (Farm) and/or Schedule E (Rental) claimed on the tax return if your return is selected for audit?		<input type="checkbox"/>	<input type="checkbox"/>
<p>I/We understand that It is my/our responsibility to keep all documents/records related to my/our tax returns. To the best of my/our knowledge, the information I/we have given is accurate and complete</p>			
Taxpayer _____ / ____/2026 Spouse _____ / ____/2026			
Mailing address _____			
Email _____@_____ Telephone _____			
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