

Form Green		2024 Rental Questionnaire	
The IRS requires tax return preparer to complete a due diligence checklist that support the claim for Schedule E			
		Yes	No
Who maintain your business records? Name _____			
What type of business records do you keep? (Computer reports/Spreadsheets/Other)			
Did you make any payments in 2024 that would require you to file Form(s) 1099?		☐	☐
If "Yes," did you or will you file required Form(s) 1099?		☐	☐
Did you "materially participate" in the operation of the rental?		☐	☐
Did you receive any 1099-MISC for rent?		☐	☐
Do you keep a separate bank account for the rental?		☐	☐
Do you keep all your business expense documents/records?		☐	☐
2024 Self Employment Questionnaire			
The IRS requires tax return preparer to complete a due diligence checklist that support the claim for Schedule C			
		Yes	No
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.		☐	☐
Did you make any payments in 2024 that would require you to file Form(s) 1099?		☐	☐
If "Yes," did you or will you file required Form(s) 1099?		☐	☐
Did you receive any 1099-NEC to support your business income?		☐	☐
Did you purchase any fixed assets? Please provide documents if Yes		☐	☐
Do you keep separate bank account for business?		☐	☐
Do you keep all your business expense documents/records?		☐	☐
Did your business make any payments for your Health Insurance, Life insurance, etc?		☐	☐
Did your business pay any rent to you in 2024?		☐	☐
Did your business pay any dues, fees or assessments to country clubs and other social organizations?		☐	☐
Do you have written documentation for mileage expenses?		☐	☐
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?		☐	☐
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 Taxpayer _____ /_____/2025 Spouse _____ /_____/2025 Mailing address _____ Email _____@_____ Telephone _____ Ark CPA Group Inc. 375 East Main St, Newport, VT 05855 802.334.8322 office@arkcpagroup.com			