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SELF EMPLOYED DUE DILIGENCE FORM

BUSINESS NAME	
TAXPAYER NAME	SOCIAL SECURITY NUMBER/EIN
BUSINESS ADDRESS IF DIFFERENT FROM HOME	
BUSINESS TELEPHONE NUMBER	WEBSITE/SOCIAL MEDIA BUSINESS PAGE
PLEASE PROVIDE A DESCRIPTION OF YOUR BUSINESS	
DID YOU RECEIVE A 1099 MISC INCOME FOR THE INCOME REPORTED?	IS A LICENSE A REQUIREMENT OF YOUR OCCUPATION?
HOW DO YOU ADVERTISE FOR YOUR BUSINESS?	
By law, you are required to keep adequate records. What type of records do you maintain to verify business income and expenses? (Check all boxes that apply.)	
Accounting Records <input type="checkbox"/> Computer Records <input type="checkbox"/> Business Bank Accounts <input type="checkbox"/> Paid Invoices/Receipts <input type="checkbox"/> Rental Expense <input type="checkbox"/> Ledgers <input type="checkbox"/> Other: _____	Business Stationery <input type="checkbox"/> Insurance <input type="checkbox"/> Advertising <input type="checkbox"/> Car/Truck Expense <input type="checkbox"/> Log Books <input type="checkbox"/> Supplies <input type="checkbox"/>
Did you file state and/or local sales tax returns for the tax year?	

By signing this form, I agree that the information provided is true and correct to the best of my ability. I understand that I am responsible for keeping a record of payment for services provided for 3 years. I have been advised by my tax preparer that the IRS may require additional verification as proof of income at a later date and it is my responsibility to provide it if requested.

Taxpayer's Signature: _____ Date: _____

Use the space on the back for additional space.