

Please complete all sections that apply to your business and upload supporting documents. Complete a separate information sheet for each business.

SECTION 1 - BASIC INFORMATION

Business Owner Name	Federal EIN# (if used)	Business Name (if no separate business name, leave blank)	Start Date (mm/dd/yyyy)
Business Address (including suite or room no.)		Business Description (include product sold or services rendered)	
Do you have any license for your business? If yes, please list them.		Do you have any employees?	
Did you materially participate in the business during the year?		Did you pay any individual or business \$600 or more in the year for services?	

If you do not maintain a separate business bank account, please explain how you differentiate between personal and business transactions?

What kind of records do you keep? Select all that apply. (You are responsible for maintaining records to substantiate all income & expenses, and for providing them upon request)

Customer receipt books	Business bank accounts	Accounting records	Log books	Other (explain below)
Paid expense receipts	Bank / Client statements	Ledgers	Electronic Logs	

SECTION 2 - INCOME INFORMATION *(Please upload all 1099 Forms and any additional documents showing income received during the year)*

Form 1099-NEC	# of forms received	Enter the total for all forms received \$
Form 1099-K	# of forms received	Enter the total for all forms received \$
Form 1099-MISC	# of forms received	Enter the total for all forms received \$
Returns and Allowances \$		Total cash, check payments paid to you \$

Other Income (Provide the description for each type of income and the amount received)

SECTION 3 - COST OF GOODS SOLD *(only if selling goods or products)*

Inventory at the beginning of the tax year	\$	Inventory purchased during the tax year	\$
Inventory withdrawn for personal use	\$	Cost of labor paid to others	\$
Cost of materials and supplies	\$	Inventory at the end of the tax year	\$

SECTION 4 - HOME OFFICE *(Space must be used exclusively for the business)*

Area exclusively used for business or storage (in sq. ft)	Total Area of your home (in sq. ft)		
Mortgage interest (homeowners - upload 1098)	\$	Real estate taxes (homeowners)	\$
Total Rent paid during the tax year	\$	Renter or homeowner insurance premiums	\$
Repairs & Maintenance	\$	Utilities (e.g. gas, electric, water, sewer, garbage)	\$
Homeowners only: Original purchase price of home \$		Land value on purchase \$	Date first used for business (mm/dd/yyyy)

SECTION 5 - VEHICLE INFORMATION

Date vehicle was first used for business (mm/dd/yyyy)	Garage rent, if any	Parking fees	Tolls
	Insurance	Property Tax	Repairs
Year, Make and Model of the Vehicle	Gas	Licenses	Oil
	Lease payments	Interest	Tires
Report your mileage for the tax year	Do you have another vehicle available for personal use?		Uber/Lyft/DoorDash drivers: Do you have a mileage summary from your online account? If yes, upload the document.
Business miles (driven for business only)	Was your vehicle available for use during off-duty hours?		
Commuting miles (to & from work site)	Do you have evidence to support your vehicle deductions?		
Personal miles (not related to work)	If yes to above question, is the evidence in writing?		

SECTION 6 - EXPENSES

(All expenses reported must have supporting documents or records, and must be provided upon request)

Advertising	Dues & Publications	Mortgage Interest (business property only)
Commissions & Fees	Legal & Professional Services	Other Interest (credit car, non-auto loans)
Contract Labor	Office Expense	Business Insurance (not auto or home)
Rent - machinery & equipment	Rent - building	Repairs & Maintenance (not vehicle expense)
Supplies	Postage & Shipping	Customer gifts and incentives
Marketing expense	Printing and Stationery	Bank Charges/Credit card processing fees
Utilities (only business related)	Education / Training	Uniforms (not usable outside work)
Wages paid	Business Travel - Meals only	Business Travel - Lodging & Transportation
Taxes - Licenses & Fees	Taxes - Payroll	Taxes - Sales (only if included in income)
Taxes - Business Property	Employee Benefits Program	Pension & Profit sharing plans

Phone Expense

Annual cost paid for phone service	\$
Percentage of time used for business	%

Internet Expense

Annual cost paid for phone service	\$
Percentage of time used for business	%

If you incurred other expenses, provide the expense description and amount in the additional comments section.

SECTION 7 - BUSINESS ASSETS

Did you acquire assets used in your business during the year (computers, equipments, etc.)? If yes, provide the details below for each item purchased.

Did you trade-in, sell, or scrap any business assets during the year? If yes, provide the details below for each item disposed.

Asset Description	Date of disposal (mm/dd/yyyy)	Amount received (\$)	Accumulated Depreciation (\$)

SECTION 8 - SELF-EMPLOYED RETIREMENT ACCOUNT CONTRIBUTIONS

Did you contribute to a retirement savings account during the tax year? If yes, provide the details below. * Contributions allowed until filing or extension due date.

Did you contribute to a retirement savings account during the tax year? If yes, provide the details below. (Contributions allowed until filing or extension due date.)			
Account Custodian	Account Type	Contribution Date* (mm/dd/yyyy)	Contribution Amount (\$)

SECTION 9 - ESTIMATED TAX PAYMENTS

IRS Q1 Apr \$ Q2 Jun \$ Q3 Sep \$ Q4 Jan \$ State Q1 Apr \$ Q2 Jun \$ Q3 Sep \$ Q4 Jan \$

SECTION 10 - ADDITIONAL COMMENTS

By entering your name below, you acknowledge that the information you have provided is true and correct to the best of your knowledge and belief, and that you have related receipts and documentation to retain with your tax records.

Authorized Business Representative:

Date: