



SELF-EMPLOYMENT FORM TAX YEAR - 2021

GENERAL INFORMATION				
Your Name <i>(First, Initial, Last Name)</i>			SSN/EIN	
Business Name		Business Address		
Type of Business				
COVID 19 INFORMATION				
Did you receive a PPP Loan? Yes No				
PPP Loan #1 _____		Was it forgiven? YES NO		When _____
PPP Loan #2 _____		Was it forgiven? Yes NO		When _____
BUSINESS INCOME				
Business Gross Income \$ _____				
MILEAGE				
Do you have <u>written</u> evidence to support the miles claimed?				Yes <input type="checkbox"/> No <input type="checkbox"/>
Number of miles claimed: Business Miles _____ Commuting Miles _____ Other Miles _____				
BUSINESS EXPENSES				
Advertising	\$ _____	Equipment Rental	\$ _____	
Worker Wages (not W2's)	\$ _____	Building Rental	\$ _____	
Insurance	\$ _____	Repairs and Maintenance	\$ _____	
Interest - Mortgage	\$ _____	Taxes and Licenses	\$ _____	
Interest - Other	\$ _____	Travel Costs (NOT Mileage)	\$ _____	
Internet	\$ _____	Meals	\$ _____	
Legal/Professional Fees	\$ _____	Utilities	\$ _____	
Office Expenses	\$ _____	Other Expenses	\$ _____	
Supplies	\$ _____	_____	\$ _____	
		_____	\$ _____	
		_____	\$ _____	
EQUIPMENT				
Did you purchase any equipment over \$500 for your business?				Yes <input type="checkbox"/> No <input type="checkbox"/>
If Yes , please list the item(s) below				
Description of Equipment	Date Acquired	Cost of the Equipment	% the Equipment was used by the Business	New or Used when Purchased

Due Diligence Questions

1. How long have you owned your business?

Brief description of business?

Where do you conduct business? Storefront Office Home Office Mobile On-site

2. What services do you perform?

3. How much do you charge for them?

4. Approximately how many clients do you have?

5. How often do you provide services for each client?

6. What types of items/supplies do you need to operate?

7. How often are they replenished?

8. Do you travel for business? Y/N

How do you keep track of mileage? Daily log Notebook Receipts Google Maps

9. When and where do you have to travel for business?

10. Can you provide any documentation to substantiate your business? Y/N

Business Cards

Business/occupational license (if required)

Business Stationary

Other tax returns (sales/excise, employment, etc)

Receipts or Receipt Book

Advertisements (newspaper, flier, yellowpages, social media)

Other _____

Business website

7. Who maintains the business records? Self Bookkeeper

8. Do you maintain separate banking accounts for personal and business transactions? Y/N

a. If "Yes," in what form were the records provided? Bank Statements Check Stubs Receipts

b. If "No," how do you differentiate between personal and business transactions?

9. How did you determine the amount of income?

10. How did you determine the amount of expense?

11. Do you have any Forms 1099-NEC? Y/N

12. If no expenses or low expenses, why are expenses so low?

13. If high expenses or overall loss, why are expenses so high?

Signed:

Date: