



SELF-EMPLOYMENT FORM TAX YEAR - 2023

GENERAL INFORMATION

Your Name (First, Initial, Last Name)		SSN/EIN
Business Name	Business Address	
Type of Business		

COVID 19 INFORMATION

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BUSINESS INCOME

Business Gross Income	\$	
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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	\$
Contract Labor	\$	Building Rental	\$
Insurance	\$	Repairs and Maintenance	\$
Interest - Mortgage	\$	Taxes and Licenses	\$
Interest - Loans/CC	\$	Travel Costs (NOT Mileage)	\$
Internet	\$	Meals	\$
Cellphone	\$	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: