

Self Employment Income Information

Name(s) as shown on return

2024 Tax Year

1. How long have you owned your business? . . . . .
Brief description of business . . . . .
Where do you conduct business? . . . . .

2. What services do you perform? . . . . .
How much do you charge for these services? . . . . .

3. Approximately how many clients do you have? . . . . .
How often do you provide services for each client? . . . . .

4. What types of items do you need to operate? . . . . .
How often are these items replenished? . . . . .

5. Do you travel for business? [ ] Yes [ ] No How do you keep track of mileage? . . . . .
When and where do you have to travel for business? . . . . .

6. Can you provide any documentation to substantiate your business?
[ ] Business cards [ ] Business/occupational license (if required)
[ ] Business stationary [ ] Other tax returns (sales/excise, employment, etc.)
[ ] Receipts or receipt book (with company header) [ ] Advertisements (newspaper, flyer, yellow pages, etc.)
Other (list any other documentation you can provide to substantiate your business):

7. Who maintains the business records? . . . . .

8. Do you maintain separate banking accounts for personal and business transactions? . . . . . [ ] Yes [ ] No
a. If "No," how do you differentiate between personal and business transactions and monetary assets?

9. In what form were business records provided to tax preparer? [ ] [ ]
[ ] Accounting records [ ] Log books
[ ] Paid invoices/receipts [ ] Ledgers
[ ] Computer records [ ] Business bank accounts
[ ] Car/truck expenses
Other (list any other forms of documentation you can provide to support your business if requested):

10. How did you determine the amount of income?
The amount of expense?

11. Form 1099-NEC:
a. Do you have any Forms 1099-NEC to support the income? . . . . . [ ] Yes [ ] No
b. If not, is it reasonable that the business type would not receive Form 1099-NEC? . . . . . [ ] Yes [ ] No