

Self Employment Income Information

2022

Name(s) as shown on return

Input fields for business type

Input field for business ownership

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? Yes No

- 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