

Business/Self-Employment Worksheet

Taxpayer Name: _____

Business Name: _____

How long have you owned your business? _____

Did you pay any individual/business \$600+ by check/cash in 2023 that would require you to file Form(s) 1099?

YES NO

Has this been done, or do you need us to do this for you? YES NO

Can you provide records of proof of income (customer names, amounts, etc.)?

YES NO

Check next to any of the following you can provide to show you are running a business and not as a hobby:

Business Cards Business Stationary

Business Occupational License (if required) Advertisement (fliers, etc.)

Other _____

Did you receive any money for Employee Retention Credit (ERC)?

YES NO

Did you sell/dispose of any assets from the business (computers, tools, furniture, equipment, etc.)?

Please list item, date disposed of/sold, amount received.

Business <u>Income</u>	
Gross receipts/sales	
Returns/Allowances	
Other income	
TOTAL Income:	

(Continued →)

Business <u>Costs</u>	
Advertising	
Commissions	
Contract Labor	
Insurance	
Interest	
Legal/Professional Fees	
Office Expense	
Rent/Lease (machinery, vehicles, equip, other prop.)	
Repairs/Maintenance	
Supplies	
Taxes and licenses	
Travel-Meals	
Travel-Hotel	
Travel-Mileage	
Utilities	
Wages	
SOLE BUSINESS USE of your home	
Other expenses-please specify	
TOTAL Expenses:	
Total INVENTORY (supplies, business items, etc.) on January 1, 2023 (\$ amt.)	
Total INVENTORY (supplies, business items, etc.) at December 31. 2023 (\$ amt)	

Vehicle Information

When did you place your vehicle in for service for business purposes? _____

If you are claiming mileage, do you have mileage logs to verify date, # of miles, destination, reason for travel (etc.)? YES NO

Of the total number of miles you drove during 2023, enter the number of miles you used for:

Business: _____

Total Other miles _____

Was your vehicle available for personal use during off-duty hours? _____

Do you (or your spouse) have another vehicle available for personal use? _____

YES NO

Do you have additional evidence to support your deduction? _____

If yes, is the evidence written? _____

By signing below, I verify that the information provided on **fronts and back** of these forms is true and correct.

Taxpayer Signature

Date

Spouse Signature

Date

Form **11652**
(January 2021)

Department of the Treasury - Internal Revenue Service

Questionnaire and Supporting Documentation
Form 1040 Schedule C (Profit or Loss from Business)

This questionnaire lists the types of records you need to send us to prove your Schedule C income and expenses. The law requires you to keep adequate records to complete your Schedule C. Please review each line of this questionnaire and answer every question. **Return the questionnaire along with copies of your supporting documents.**

Note: Failure to complete all parts of this questionnaire and submit the supporting documentation can delay the examination of your return and the final determination of your tax liability.

Name		Social Security Number
Business address		Year business started
Telephone Number	Business website (if applicable)	

1. Provide a description of your business (type of work, product sold, service provided, hours of operation, where business is conducted, etc.)

2. Provide a copy of your business license or permit if applicable

3. How do you advertise your business? If you pay for advertisement, submit copies of receipts or other proof of payment

4. Did you file state or local sales tax returns for the year

Yes (provide copies) No Not applicable

5. Did you receive Forms 1099-MISC, 1099-NEC or 1099-K for the income reported

Yes (provide copies) No

6. Provide copies of records to support the business income reported for any income you received not included on a Form 1099. Check all boxes that apply (below references are intended to be illustrative and don't constitute government endorsement of any private product, service, entity, or enterprise)

- Business/Personal bank account statements with business income highlighted
- Accounting records (e.g., QuickBooks, Peachtree)
- Electronic payment records (e.g., Apple Pay, PayPal, Zelle, Cash App)
- Logbooks/Ledgers
- Invoices/Receipts issued to customers for goods and services
- Other _____

7. Provide copies of records to support the business expenses reported. Check all boxes that apply (below references are intended to be illustrative and don't constitute government endorsement of any private product, service, entity, or enterprise)

- Invoices/Receipts received from suppliers for goods and services purchased
- Rental Contracts
- Business insurance contracts
- Electronic payment records (e.g., Apple Pay, PayPal, Zelle, Cash App) with expenses highlighted
- Mileage log and receipts for actual car/truck expenses
- Bank/Credit card statements with expenses highlighted
- Other _____

Information about Schedule C can be found in IRS Publication 334, Tax Guide for Small Business, and Publication 583, Starting a Business and Keeping Records. These publications can be downloaded from www.irs.gov/forms or can be requested by calling 800-TAX-FORM (800-829-3676).

For Paperwork Reduction Act Notice, see the Schedule C Instructions.