Schedule C Questionnaire

PERSONAL INFORMATION:

- **Filing Status**: ☐ Single ☐ Married Filing Joint ☐ Married Filing Separately ☐ Head of Household ☐ Qualifying Widower
- **Taxpayer IRS PIN#** (if applicable): _____
- **Social Security Number**: _____
- **First Name**: _____
- **Middle Initial**: _____
- **Last Name**: _____
- **Email**: _____
- **Work Phone**: _____
- **Cell/Other Phone**: _____
- **Date of Birth**: _____
- **Date of Death**: _____
- **Preferred Method of Contact**: ☐ Email ☐ Phone ☐ Text
- **Occupation**: _____

BUSINESS INFORMATION:

- **Business Name**: _____
- **Date Business Was Created**: _____
- **Business Structure**: ☐ Sole Proprietorship ☐ LLC ☐ Corporation ☐ Partnership
- **Type of business**

    ☐ Service based

    ☐ Product based (carry inventory)

    ☐ Product base (do not carry inventory)

- **Business Location:**

    ☐ Brick and mortar

    ☐ Online

    ☐ Both

- **LLC Details (if applicable)**:
    - **LLC Name**: _____
    - **Date of LLC Formation**: _____
    - **State of Formation**: _____
    - **EIN (if obtained)**: _____

ADDRESS:

- **Business Street Address**: _____
- **Business Email:** _____
- **City**: _____
- **State**: _____
- **ZIP Code**: _____
- **County**: _____

INCOME:

How do you pay yourself?

☐ I issue myself a W2

☐ I issue myself a 1099 NEC or 1099 MISC

☐ Owners Draw (withdraw money from my business account)

Do you have employees or independent contractors you pay?

☐ Yes

☐ No

Did you receive a 1099 NEC from another company?

☐ Yes

☐ No

EXPENSES:

Do you have a separate business account?

☐ Yes

☐ No

Do you make business purchases using your personal bank account?

☐ Yes

☐ No

How do you record your Expenses?

☐ pen and paper

☐ Excel or Google Sheets

☐ Quickbooks

☐ Xero

☐ Wave

☐ Sage

☐ Zoho

☐ Appointment Book

☐ Calendar

☐ Shoe Box method

☐ Other _____

Did you make any large equipment purchases for your business? This is for depreciation purposes. Depreciation is deducting the cost of items such as equipment, over time opposed to deducting them fully in one tax year.

☐ Yes

☐ No

If you deduct miles, how do you keep track of your mileage?

☐ Excel or Google Sheets

☐ App on my phone

☐ Pen and Paper

☐ I do not, I estimate my mileage each year

Did you have any travel, meals, or entertainment expenses for business purposes?

☐ Yes, Tell me more about these expenses

_____
_____
_____
_____

☐ No

Do you use a portion of your home exclusively for your business? (this has to be separate room and not a shared room like a kitchen table) If you checked this box answer the following questions:

☐ Yes,

- What is the square footage of your home? _____
- What is the square footage of your home office? _____

☐ No

Do you share your home office space with another business you run or your spouse run?

☐ Yes

☐ No

Do you have home-related expenses such as mortgage insurance, mortgage interest, utilities and/or repairs?

☐ Yes

☐ No

Do you have receipts for all or some of the expenses you are claiming? We are asking because we may need copies of some receipts to substantiate the accuracy. Also, you will need them if audited by the IRS.

☐ Yes

☐ No

Income and Expenses:

1. **Total Business Income (Gross Receipts)**: $_____
2. **Business Expenses (Deductible)**:
    - **Rent/Mortgage**: $_____
    - **Utilities**: $_____
    - **Advertising**: $_____
    - **Office Supplies**: $_____
    - **Software Costs**: $_____
    - **Phone/Internet**: $_____
    - **Travel Expenses**: $_____
    - **Professional Fees (e.g., legal, accounting)**: $_____
    - **Other Expenses (Specify)_____ $_____**

Have you had a business loss in the last 5 years? (A Loss is when your business expenses exceed your business gross income)

☐ Yes, Explain why?

_____

_____

_____

_____

☐ No

ANYTHING ELSE YOU WOULD LIKE TO ADD OR EXPLAIN ABOUT YOUR BUSINESS?

_____

_____

_____

_____

_____

_____

WHAT DO YOU NEED HELP WITH?

_____

_____

_____

_____

_____

_____

_____