

Tax Preparation Program Schedule C Intake Sheet

Business Identification and Setup

☐ For-profit business ☐ Hobby

Note: Taxpayer will need documentation (e.g., receipts) to support any amounts listed below.

Name of Taxpayer _____ MI _____ Last Name _____

SSN/ITIN _____ Business Code _____ EIN _____

Principal business or profession, including product or service _____

Business Name. If no separate business leave blank. _____

Business Address 1 _____ Address 2 _____ Suite _____

Address City _____ State _____ Postal Code _____

Accounting Method ☐ Cash ☐ Accrual ☐ Other (specify) _____

Did you "materially participate" in the operation of this business during the tax year? ☐ Yes ☐ No

Did you start or acquire the business during the tax year? ☐ Yes ☐ No

(R) Did you make payments during the tax year requiring you to file Form(s) 1099? ☐ Yes ☐ No

(R) If "yes," did you or will you file the required Form(s) 1099? ☐ Yes ☐ No

Income

Gross receipts or sales _____ Did you receive any Forms 1099-K? ☐ Yes ☐ No

Was any of your income reported to you on Form W-2 and the "Statutory Employee" box on the form was checked? ☐ Yes

(R) Do you maintain an inventory? ☐ Yes ☐ No

Vehicle Information

Describe your vehicle (year, make, and model) _____

When did you place your vehicle in service for business purposes? (month, day, year) ____ / ____ / ____

Did you sell or trade-in, in the tax year, a vehicle you used for business? If yes, how many total miles did you claim? _____

Of the total number of miles you drove your vehicle during the tax year, how many miles did you use your vehicle for:

Business _____ Commuting (from home to work and back) _____ Other _____

Was your business vehicle available for personal use during off-duty hours? _____ ☐ Yes ☐ No

Do you (or your spouse) have another vehicle available for personal use? _____ ☐ Yes ☐ No

Do you have evidence to support this deduction? _____ ☐ Yes ☐ No

If "Yes," is the evidence written? _____ ☐ Yes ☐ No

Expenses

Enter your expenses, except for business use of your home, below

8	Advertising	_____	19	(R) Pension and profit-sharing plans	_____
9	Car and truck expenses	_____	20	Rent or Lease	_____
10	Commissions and fees	_____		a Vehicles, machinery, and equipment	_____
11	Contract labor	_____		b Other business property	_____
12	Depletion	_____	21	Repairs and maintenance	_____
13	(R) Depreciation and § 179 expense deduction	_____	22	Supplies	_____
14	(R) Employee benefit programs (other than line 19)	_____	23	Taxes and licenses	_____
			24	Travel, meals, and entertainment:	_____
15	Insurance (other than health)	_____		a Travel	_____
16	Interest:	_____		b Deductible meals and entertainment	_____
	a Mortgage (paid to banks, etc.)	_____	25	Utilities	_____
	b Other	_____	26	(R) Wages	_____
17	Legal and professional services	_____	27	a Enter other expenses below	BELOW
18	Office expense	_____	30	(R) Use part of your home for your business?	<input type="checkbox"/> Yes <input type="checkbox"/> No

(R) Did you buy or sell any business machinery, or equipment? ☐ Yes ☐ No

(R) Do you have your depreciation schedule(s) for your business vehicles, machinery, and equipment? ☐ Yes ☐ No

Other Expenses

Below, list business expenses not included on lines 8-26 or line 30

_____	_____
_____	_____
_____	_____
_____	_____

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Self-Employment Income Due Diligence

☐ For-profit business ☐ Hobby

Note: Taxpayer will need documentation (e.g., receipts) to support any amounts listed below.

Name of Taxpayer _____ MI _____ Last Name _____
SSN/ITIN _____ Business Code _____ EIN _____

1 How long have you owned your business? _____

2 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 (newspapers, flier, yellow pages, etc.)

Other (just any other documentation you can provide to substantiate your business)

3 Who maintains the business records?

4 Do you maintain separate banking accounts for personal and business transactions? ☐ Yes ☐ No

If "Yes," in what form were the records provided?

If "No," how do you differentiate between personal and business transactions and monetary assets?

5 Were satisfactory records of income and expense provided? ☐ Yes ☐ No

If "Yes," in what form were these records provided?

- ☐ Accounting Records ☐ Car/truck expenses ☐ Computer records
☐ Paid invoices/records ☐ Ledgers ☐ Log books ☐ Business bank accounts

Other (list any other forms of documentation you can provide to support your business)

If "No," how did you determine:

The amount of income?

The amount of expenses?

6 Form 1099-MISC:

a Do you have any Forms 1099-MISC to support the income? ☐ Yes ☐ No

b If not, is it reasonable that the business type would not receive Forms 1099-MISC? ☐ Yes ☐ No

7 Are the expenses consistent with the type of business? ☐ Yes ☐ No

8 Are the amounts of expense reasonable? ☐ Yes ☐ No

9 Are any expenses that are typical for this type of business missing? ☐ Yes ☐ No

10 List any other information you can provide related to your business?

If you use part of your home for your business, what is the square footage of the following?

Area used regularly and exclusively for business _____ Total area of home _____