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Sole-Proprietor Questionnaire for 2016

Date: _____

CLIENT NAME: _____

Please circle "Y" for Yes or "N" for No

Y N Did you go through your checkbook to confirm your income?

Y N Did you only include income received and expenses paid in 2016?

Y N Did you use your vehicle for Business?
If yes, compile expenses into categories (Example: Insurance, repairs, tolls, parking, gas, etc).
If yes, also write down the beginning miles _____ and ending miles _____.

Y N Did you use your vehicle 100% for Business?
If no, you must write down your mileage for personal use in 2016? _____

Y N Did you purchase any assets in 2016 that cost more than \$500? Is there any loans?
If yes, write a separate list with item description, date purchased, cost and give us loan papers.

Y N Did you pay self-employed health insurance?
If yes, amount paid in 2016 \$_____.

Y N Did you use your house/garage/shed for home office or storage? (Circle which one)
If yes, I need square footage of office space and square footage of house/apartment?
Office Space Square Footage: _____ House/Apartment Square Footage: _____

If yes, I need a list of direct expense and indirect expenses.
Explained: Direct Expenses are paint, carpet, drapes etc. for office, shelving for storage
Indirect Expenses: Utilities, cable, internet, house/renters insurance, rent, house repairs etc.
If clients/customers come to your house - lawn care, driveway repair landscaping

Y N Did any thing happening in your business in 2016 that I should know about?
Explain: _____

Y N Did you receive 1099's (including 1099-K for credit card receipts)?
If yes, give us a copy.

About Tax Year 2017:

Y N Do you anticipate your income to increase or decrease in 2017?

Y N Do you plan on purchasing any assets in 2017?

Y N Is there any business situation coming up in the next few years that I should know about?
Explain: _____

