



Business Information

Name of sole proprietor

Employer Identification Number (EIN), if any

Business name (if different)

Principal business activity

Accounting Method

Business Street Address (if different than personal)

City

State

Zip Code

Background Questions

Yes No

- Did you materially participate in this business this year?
- Was the business started in 2016?
- Do you have inventory?
- Do you have any auto expenses?
- Do you have any travel, lodging, or meal expenses?
- Do you have business use of your home?
- Did you or your spouse pay for your own health insurance?
- Did you make, or do you plan to make, any contributions to a self-employment retirement plan?
- Did you pay any individual \$600 or more for contract labor?
- Did you pay any family members for services?
- Did you use any area of you home *exclusively* for business, or did you use an area of your home for storage?
- Was the primary purpose of your business activity to realize a profit?
- Did you manufacture items for resale?

Income

Revenue

Other income

Returns and allowances

Costs of Goods Sold - Inventory Costs

Inventory at beginning of year

Purchases

Personal use amount

Cost of labor (**not** yourself)

Materials and supplies

Other costs

Inventory at end of year

Valuation Method

Car Expenses

Business Mileage

Other Mileage

Date car placed into business use

Yes No

- Is the car available for personal use during off-duty hours?
- Do you (or your spouse) have any other cars for personal use?
- Do you have evidence of the provided mileage numbers?
- Is your evidence written? (e.g., mileage log book, list of appointments, etc.)

Expenses

Expense	Amount
Advertising	
Commissions and fees	
Contract labor	
Employee benefit programs	
Insurance (other than health)	
Interest - Mortgage	
Interest - Other	
Legal and professional fees	
Office expenses	
Pension and profit-sharing plans	
Rent or lease vehicles, machinery, and equipment	
Rent or lease other business property	
Repairs and maintenance	
Supplies (not included in inventory cost)	
Taxes and licenses	
Utilities	
Wages	
Other	

Equipment Purchases

Asset	Date Purchased	Cost	Date placed into service	New or used?

Equipment Sold During Year

Asset	Date out of service	Date sold	Selling Price	Trade-in?

Other

Is there any more information (e.g., home office, travel/per diem expenses, etc.) you need to provide me to prepare a complete and accurate return? If yes, please attach the documentation and provide a brief description. You may also use this space to pose any questions you have for me.