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SELF-EMPLOYED QUESTIONNAIRE

This information is used to supplement the Client Intake Sheet in compliance with the IRS
We are required to retain your answers as back up for statements made in your tax filing
This is a basic questionnaire and the IRS could ask for further proof of your answers.
Answer questions only in the section required.

Name:

Self-employed

How long have you owned the business?

Can you provide supporting documents such as:

Business cards Invoices Trade license

Prior year tax returns Other

*please bring to your appointment, or send copies via email.

Who maintains business records?

Do you have separate bank accounts for personal and
business expenses and income?

Y

N

Did you receive any 1099s?

Y

N