

## SELF-EMPLOYMENT QUESTIONNAIRE

BUSINESS NAME \_\_\_\_\_

BUSINESS DESCRIPTION \_\_\_\_\_

EIN \_\_\_\_\_

BUSINESS ADDRESS \_\_\_\_\_

PAYMENT FORM: CASH ACCRUAL OTHER \_\_\_\_\_

DID YOU PARTICIPATE IN OPERATION OF THE BUSINESS?

DID YOU START THIS BUSINESS IN 2022?

DO YOU TRAVEL FOR BUSINESS?

WHO MAINTAINS THE BUSINESS RECORDS?

DO YOU MAINTAIN SEPARATE BANKING ACCOUNTS FOR PERSONAL AND BUSINESS TRANSACTIONS?

GROSS: \_\_\_\_\_

NET PROFIT OR LOSS: \_\_\_\_\_

### EXPENSES:

ADVERTISING _____	PENSION & PROFIT SHARE _____
CAR & TRUCK EXPENSES _____	VEHICLE, MACHINERY, EQUIP RENTAL _____
COMMISSION & FEES _____	OTHER RENTAL _____
CONTRACT LABOR _____	REPAIRS & MAINTENANCE _____
DEPLETION _____	SUPPLIES _____
DEPRECIATION & EXPENSES _____	TAXES & LICENSES _____
EMPLOYEE BENEFIT _____	TRAVEL _____
INSURANCE _____	MEALS & ENTERTAINMENT _____
MORTGAGE INTEREST _____	UTILITIES _____
OTHER INTEREST _____	WAGES _____
LEGAL & PROFESSIONAL SERVICES _____	OTHER: _____
OFFICE EXPENSES _____	OTHER: _____

## ITEMIZATION QUESTIONNAIRE

### MEDICAL AND DENTAL EXPENSES

1. MEDICAL AND DENTAL EXPENSES \_\_\_\_\_

### TAXES YOU PAID

1. STATE AND LOCAL \_\_\_\_\_

A. INCOME TAX \_\_\_\_\_

B. GENERAL SALES TAX \_\_\_\_\_

2. REAL ESTATE TAXES \_\_\_\_\_

3. PERSONAL PROPERTY TAX \_\_\_\_\_

4. OTHER TAX \_\_\_\_\_

### INTEREST YOU PAID

5. HOME MORTGAGE INTEREST AND POINTS \_\_\_\_\_

6. MORTGAGE INSURANCE PREMIUMS \_\_\_\_\_

7. INVESTMENT INTEREST \_\_\_\_\_

### GIFTS TO CHARITY

8. GIFTS BY CASH OR CHECK \_\_\_\_\_

9. OTHER THAN BY CASH OR CHECK \_\_\_\_\_

10. CARRYOVER FROM PRIOR YEAR \_\_\_\_\_

### CASUALTY AND THEFT LOSSES

11. ATTACH FORM 4684

### JOB EXPENSES AND CERTAIN MISCELLANEOUS DEDUCTIONS

12. UNREIMBURSED EMPLOYEE EXPENSES \_\_\_\_\_

13. TAX PREPARATION FEES \_\_\_\_\_

14. OTHER EXPENSES \_\_\_\_\_