

Business Questionnaire & Organizer: Tax Year _____ **Advisor Tax Services**

Name _____ Signature _____ Date _____

Section A - New clients or new business, complete all; prior clients, enter only changes from last year

- Business name (if any) _____ LLC ? Y N
- Business address (if any) _____
- Principal business or profession _____
- What product or service do you provide ? _____
- Y N Have you registered your business or trade name with the Secretary of State office ?
- Y N If you began business this year, did you incur expenses prior to startup (legal, marketing, etc.) ?

Section B - All clients circle Y or N for all questions During the past year, did you or your business

- Y N have a federal tax ID number (EIN#) ? If yes, please provide _____
- Y N purchase or sell your business ?
- Y N have employees ? If yes, were any family members ? Y N
- Y N pay for services provided to your business by any individuals, LLCs, partnerships or attorneys ?
If yes, you may be required to issue a 1099 to anyone that you paid \$600 or more and copy to IRS
- Y N buy items out of state or via the internet for which you paid no sales tax (use tax may be due) ?
- Y N accept credit cards ?
- Y N use any part of your home exclusively and regularly for your business ?
If yes, see our Business use of home organizer @ <http://www.advisortaxservices.com/forms.html>
- Y N conduct business in multiple states ?
- Y N have any barter income (exchange of services or product with a customer) ?
- Y N purchase any business assets (items costing \$500 or more and having a useful life greater than 1 year such as equipment, computers, furniture, vehicles, real estate, etc.) ?
If yes, provide the following information for each item or group of items

Description	Date purchased	Date placed in service	Cost
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Y N sell any business assets ?

Item	Date sold	Amount	Item	Date sold	Amount
_____	_____	_____	_____	_____	_____

- Y N carry an inventory (products for resale or materials to make products) ?
If yes, provide the following information. (Note: value is based on your cost, not retail value)
- Inventory (items for resale) purchases during year _____
- Material (items used to create product) purchases during year _____
- Inventory/materials on hand at year end _____

Section C – Business Income (for this business only, do not include other income such as wages)

Y N Did you receive any forms 1099-K from credit card companies ?

Y N Did you receive any forms 1099-MISC from customers ?

Y N N/A If yes, did the amount reported to you include reimbursed expenses ?

Y N Did you verify amounts on forms 1099-MISC against your records ?

Gross Income _____

Refunds to customers _____

Section D – Business Expenses (enter type of expense where it says “Other”, ex. Website hosting)

Advertising/Marketing _____

Commissions/fees _____

Contract labor _____

Employee benefits _____

Insurance:

Property/hazard _____

Liability _____

Workers compensation _____

Other _____

Interest: (not vehicle loans)

Mortgage _____

Business loan _____

Credit line _____

Other _____

Professional fees:

Accounting _____

Legal _____

Other _____

Office expenses _____

Pension contributions _____

Rent or lease (equipment) _____

Rent or lease (real estate) _____

Repairs & Maintenance _____

Supplies _____

Taxes:

Payroll _____

Property _____

Utilities _____

Wages (gross, not net) _____

Travel (not personal vehicle):

Parking/Tolls _____

Car/truck rental _____

Air/Train/Bus _____

Taxi/tips _____

Lodging _____

Meals & Entertainment _____

Bank fees _____

Merchant account fees _____

Business gifts _____

Dues _____

Books/Publications _____

Software (annual) _____

Postage & Delivery _____

Printing & Reproduction _____

Conventions/Trade shows _____

Professional education _____

Trash & Recycling _____

Licenses/Permits _____

Uniforms/Safety gear _____

Small tools _____

Telephone (not cell) _____

Cell phone total _____

% business use ___ x total = _____

Internet access total _____

% business use ___ x total = _____

Other _____

Personal Vehicle Use: description _____ Total miles _____ Business miles _____

NOTE: if you used more than 1 vehicle for business purposes or wish to deduct actual costs, please use our Business use of Personal Vehicle organizer @ <http://www.advisortaxservices.com/forms.html>