JK ASSOCIATES LLC - 2021 TAX YEAR BUSINESS INTERVIEW SHEET (INCLUDING SELF-EMPLOYED, PARTNERSHIPS, RENTAL PROPERTIES, ETC)

| Name of Business:phone number: | Responsible party's SSN | (required) | |
|---|---|-----------------|--|
| email:address: | | | |
| Type of Business: □ C-Corp □ S-Corp □ Partnership □ Sole Proprietor □ QJV □ Rental Do you have a partnership agreement or operating agreement? □ Yes □ No (if yes, please provide a copy) | | | |
| | naintain adequate records. Please indicate your method of recordke ting program | | |
| List all states in which business v List all states where you had sale | 5 | | |
| If you paid \$600 or more to any non-employee (eg. accountant, lawyer, carpenters, etc) for services in 2021, you may be required to file Form 1099. If you are unsure, please ask! This is a required question on your return and there are penalties for non-compliance. We have a guide on our website: http://jkassociatestax.com/files/1099-Reporting- Requirements.pdf | | | |
| Did you make any payments in 2021 that would require you to file Form(s) 1099? □ Yes □ No If yes, did you file those forms? □ Yes □ No Do you want JK Associates LLC to file those forms? (Fees apply) □ Yes □ No | | | |
| | port if your business is incorporated or an LLC. Corporations, LLCs, a o file a Personal Property Tax Return if they have property or invent n extension to June 15th). | | |
| Do you want JK Associates LLC t □ Yes □ No | o prepare your MD Annual Report and Personal Property Tax Return | n? (Fees apply) | |
| Did you receive any COVID relie | | | |
| PPP Employee Re Employee Re | | | |
| □ EIDL grant □ Payroll tax de □ EIDL Ioan □ Credit for Sicl □ Other | k and Family Leave | | |
| | ships only : ss-through entities to deduct state/local taxes on behalf of a member of State And Local Tax on your personal itemized deductions. Are y | | |
| □ Yes □ No □ Need more info | ormation | | |
| Are you ready for the new Corporate Transparency Act? The CTA requires registration with FINCen of all beneficial owners of corporations and LLCs. Your initial filing will be required within one year of the effective date of final regulations. The final regulations comment period ends 2/7/2022. | | | |
| □ Yes, will register when availa | ble 🗆 No, I will need help 🛛 I need more information | | |
| GENERAL | | YES NO | |

- 1 Were any assets sold, retired, or converted to personal use last year?
- 2 Does your business have inventory?
- 3 Do you have an accountable plan for reimbursement of employee/owner expenses?
- 4 If self-employed, do you have deductible health insurance premiums (including Medicare)?

| YES | NO |
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- Did you receive a 1099-K (for credit card payments)? 5
- 6 Did you use a home office regularly and exclusively for business?
- 7 Did your business make any estimated tax payments to federal, state, or other authorities?
- How many employees does your business have? 8
- 9 Do you have a capitalization policy?
- Did you use any personal assets (i.e. home computer, car phone, etc.) for business? 10
- 11 Did you use any business assets for personal use?

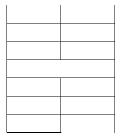
BANKING (
Check if you do not have a business account)

- Was all business income deposited into your business account? 14
- 15 Were all business expenses paid for from your business account?
- 16 Was your business account used only for business expenses (no personal expenses?
- 17 Are bank accounts, credit cards and loans already reconciled?
- 18 Did you contribute/withdraw money or loan to/receive a loan from your business?

BUSINESSES: IF YOU ANSWER NO TO QUESTION A OR B, PLEASE EXPLAIN BELOW

- А Do you have the required documentation for all deductions claimed, including date, amount, place, business purpose, parties involved and business relationship of the parties for all meals, entertainment, travel, business auto, and business gifts deducted?
- В Did you keep contemporaneous mileage logs? THE IRS REQUIRES LOGS.

Signature:_____ Date:_____



| YES | NO |
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| YES | NO |
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