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

Name of Pusiness	Posponsible Party				
Name of Business:phone number:	Responsible Party:Responsible party's SSN	(rea	juired)		
email:		(1 0 9	, ou ,		
address:					
Type of Business: ☐ C-Corp ☐ S-Corp ☐ Partners Do you have a partnership agreement or operating agreement		copy)			
All businesses are required to maintain adequate recor □ QuickBooks □ other accounting program □ written Accounting method: □ Cash □ Accrual			e		
List all states in which business was conducted last year List all states where you had sales last year:	r:				
If you paid \$600 or more to any non-employee (eg. acc be required to file Form 1099. If you are unsure, please penalties for non-compliance. We have a guide on our Requirements.pdf	ask! This is a required question on your return	n and the	re are		
Did you make any payments in 2019 that would requi If yes, did you file those forms? ☐ Yes ☐ No Do you want JK Associates LLC to file those forms? (I					
Maryland requires an annual report if your business is incorporated or an LLC. Corporations, LLCs, and non-LLC partnerships are also required to file a Personal Property Tax Return if they have property or inventory. The due date is April 15th (you may apply for an extension to June 15th).					
Do you want JK Associates LLC to prepare your MD Anr ☐ Yes ☐ No	ual Report and Personal Property Tax Return?	(Fees ap	ply)		
, ,	e describe:				
☐ PPP ☐ Employee Retention Credit					
☐ EIDL grant ☐ Payroll tax deferral					
☐ EIDL loan ☐ Credit for Sick and Family Leave ☐ Other					
MD S-Corporations and Partnerships only : MD has a new deduction for pass-through entities to deduct state/local taxes on behalf of a member. This is in response to the \$10K limitation of State And Local Tax on your personal itemized deductions. Are you interested in taking advantage of this?					
☐ Yes ☐ No ☐ Need more information					
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 available ☐ No, I will need help ☐ I need more information					
GENERAL		YES	NO		
1 Were any assets sold, retired, or converted to per	rsonal use last year?				
2 Does your business have inventory?3 Do you have an accountable plan for reimbursem	ant of amplayaa/ayynar aynanaa?				
3 Do you have an accountable plan for reimbursem	eur or embioheeromier exhenzez;				

4 If self-employed, do you have deductible health insurance premiums (including Medicare)?

5	Did you receive a 1099-K (for credit card payments)?		
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?		
8	How many employees does your business have?		
9	Do you have a capitalization policy?		
10	Did you use any personal assets (i.e. home computer, car phone, etc.) for business?		
11	Did you use any business assets for personal use?		
	PANKING (F) Check if you do not have a business assount)	YES	NO
14	BANKING (Check if you do not have a business account) Was all business income deposited into your business account?	ILO	140
15	Were all business expenses paid for from your business account?		
16	· · · ·		
17	Was your business account used only for business expenses (no personal expenses?		
18	Are bank accounts, credit cards and loans already reconciled?		
10	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	YES	NO
Α	Do you have the required documentation for all deductions claimed, including date, amoun	t,	
	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.		
Signa	oture:Date:		
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