



- 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?


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

- 14 Was all business income deposited into your business account?
- 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?

YES	NO

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

- A 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?
- B Did you keep contemporaneous mileage logs? THE IRS REQUIRES LOGS.

YES	NO

Signature: \_\_\_\_\_ Date: \_\_\_\_\_