

**FORM 11652 – QUESTIONNAIRE & SUPPORTING DOCUMENTATION FOR 1040 SCHEDULE C, F, & E**

**(PROFIT OR LOSS FROM BUSINESS)**

Business Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Business Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Business Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Cell Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Business Website: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. Please provide a description of your business. (i.e. type of work, product sold, service provided, hours of operation, where business is conducted, etc.: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
2. Did you receive Form/s 1099 MISC for the income reported? \_\_\_\_\_ Y \_\_\_\_\_ N
3. If you did not receive Form/s 1099 MISC for the income reported, provide a copy of the record of income showing the customer name. Also, include the Social Security or employer identification number (EIN), if available. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
4. Is a license a requirement of your occupation? \_\_\_\_\_Y \_\_\_\_\_ N
5. Do you have a business license? \_\_\_\_\_ Y \_\_\_\_\_ N
6. How do you advertise for business? (Please submit copies of your advertisement & paid receipts): Newspaper \_\_\_ Website \_\_\_ Email \_\_\_ Flyers \_\_\_ Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
7. By law you are required to keep adequate records. What type of records do you maintain to verify business Income & Expenses? (Please check all that apply): Accounting records \_\_\_ Computer records \_\_\_ Business Bank Accts \_\_\_ Advertising \_\_\_ Paid Invoices/Receipts\_\_\_ Log Books \_\_\_ Ledger \_\_\_ Suppliers \_\_\_
8. Did you file state &/or local sales tax returns for the tax year? \_\_\_\_\_ Y \_\_\_\_\_ N

***This form is used by the IRS in an Audit. Please use this as a tool for the information we need to complete your tax return.***

**Mileage**

Discussed with taxpayer the method of record keeping for mileage.

Discussed with taxpayer the way to log mileage and 3rd party verification.

Log: Each taxpayer for each vehicle for each type of mileage claim should keep a contemporaneous log of miles driven for business purposes which includes beginning and ending odometer reading from 01/01 to 12/31 and a description of the mileage, where and why. Paper log or software log.

3rd Party Verification: Someone unrelated to the taxpayer need to validate the odometer of each vehicle use to claim the deduction.

Example; twice a year each vehicle needs to be serviced for something. Have the vendor write on the Sales invoice what the mileage states when being serviced.

Went over the mileage rate and what expenses they may take while claiming mileage as a deduction. This includes, parking, tolls and interest on the vehicle loan.

Taxpayer Signature: Date:

Tax Preparer: Date:

Updated for tax year 2019

O’Haver Financial