



2019 SELF EMPLOYED CHECKLIST

(Use this portion of the checklist only if you are self-employed or have a Farm)

_____ (ANSWER QUESTIONS BELOW AND/OR INCLUDE INFORMATION)

- a.) Name of business _____
- b.) Business physical address _____
- c.) Taxpayer identification number. _____
- d.) If this is a new business please include incorporation, registration and operating documents and agreements.
- e.) Include a balance sheet and profit and loss from your accounting records, or enough information in the form of other documentation of your gross income and expenses. (If you would like to provide us with a copy of your data file from QuickBooks please email John Edgar john@jedgarcfo.com for a secure link to upload the data or make arrangement for the file transfer)
- f.) Include detail list of capital equipment and furniture purchased/sold, including description, date purchased/sold, and amount paid/received. Please include copies of Purchase and Sale documents and Loan documents.
- g.) If you are deducting your vehicle include your mileage. Total miles driven, business miles driven, other non-deductible miles.
- h.) If you have employees provide copies of the last payroll register or copy of W-3/W-2
- i.) Did you make any payments to vendors which required 1099 reporting? ____ If yes did you or will you file 1099? ____ . Please provide copies if filed.
- j.) We may ask for more detailed support once we have reviewed your information.

_____ Home office deduction: include square feet of office versus square feet of home and expenses of your home office. (Utilities, insurance, repairs, improvements, rent or mortgage interest and property taxes.)

