

Did you send 1099s to the required independent contractors?

- Yes
- No, I should have sent 1099's but I didn't
- No, I was not required to send 1099's

Did your business receive any PPP funds? If so, how much?

- Yes—provide amount: _____
- No

What percentage of the PPP funds did you use for qualified expenses? _____%

Did you receive any EIDL funds in 2020?

- Yes—provide amount: _____
- No

Were the EIDL funds a grant or loan? _____

If you are self-employed, were you unable to perform your self-employed activities due to Coronavirus related care you needed?

- Yes
- No

If you are self-employed, were you unable to perform your self-employed activities due to Coronavirus related care you provided to your son or daughter under the age of 18?

- Yes
- No

If you are self-employed, were you unable to perform your self-employed activities due to Coronavirus related care you provided to another?

- Yes
- No

Did you trade your services for another service (bartering)?

- Yes—provide details: _____
- No

Was your home used for business purposes?

- Yes—I own my home
- Yes—I rent my home
- No

How many months was your home used for business last year? _____

What is the TOTAL square footage of your home? _____

What is the total square footage used **exclusively** for business? _____

Provide ANNUAL totals for the following:

Rent (NOT personal mortgage): \$ _____
Gas/Electric: \$ _____
Water: \$ _____
Garbage: \$ _____
Insurance: \$ _____
Cleaning: \$ _____
HOA Dues: \$ _____
Gardening: \$ _____
General Repairs: \$ _____
Repairs/Maintenance (done only to business area): \$ _____

Did you use your vehicle for business purposes? NOTE: If you do not have a home office, any miles driven from home to work are *personal* miles, which are NOT deductible!

- Yes
- No

Provide ANNUAL totals for the following:

Total personal miles driven: _____
Total business miles driven: _____
Year/Make/Model of Vehicle: _____
Purchase Price: \$ _____
Purchase Date: _____
Date First Used for Business: _____
Cost of Gas: \$ _____
Cost of Insurance: \$ _____
Cost of Repairs: \$ _____
Cost of Registration: \$ _____

Was the vehicle available for personal use during non-business hours?

- Yes
- No

Do you have another vehicle available for personal use?

- Yes
- No

Do you have written documentation to support these expenses?

- Yes
- No

NOTE: All S-Corps, C-Corps, and LLCs must file a Statement of Information with the Secretary of State. Failure to file will result in a \$250 penalty and suspension of entity with the State of California. Check your specific situation at: www.sos.ca.gov

Did you receive income through a merchant account?

- Yes—upload Form 1099-K
- No



If you provided us with access to your QuickBooks Online file, you do **NOT** need to fill out the following section!

What was your TOTAL **SELF-EMPLOYED** INCOME amount? \$ _____

Accounting		Advertising/ Marketing		Bank Charges	
Business Gifts		Business License		Continuing Education	
Charitable Contributions		Delivery & Freight		Dues & Subscriptions	
Employee Benefits		Equipment Rental		Incentives & Awards	
Liability Insurance		Workers' Comp		Malpractice Insurance	
Disability Insurance		Employee Medical Insurance		Entertainment (may be state deduction)	
Errors & Omissions Insurance		Owners Medical Insurance		Interest	
Internet		Janitorial		Job Materials	
Laundry & Cleaning		Legal & Professional		Meals	
Merchant Fees		Office Expense		Outside Services	
Parking & Tolls		Payroll Officer GROSS Wages		Payroll Employee GROSS Wages	
Payroll Taxes Employer		Pension & Profit Sharing		Product Purchases	
Postage		Printing		Rent for Office (Not home)	

Repairs		Sales/ Presentations		Security	
Small Tools		Storage		Supplies	
Telephone		Travel (Airfare, Lodging)		Uniforms	
Utilities (not home		Other		Other	
Other		Other		Other	