



Check One: Sole Proprietor _____ Rental Income _____ Farm Income _____

Business Name _____

YES

NO

General Questions:

- Are you a registered LLC? YES NO
- Was your business started or closed during 2023? YES NO
- Did you buy, sell, dispose of, or transfer any property (Assets)? YES NO
- Did you pay any non-employees in 2023 that would require you to file Form(s) 1099? YES NO
- If yes, did you/will you file required Forms 1099? Provide copies. YES NO
- Was any of this income earned in Kansas City (subject to KC E-Tax)? YES NO
- Did you participate in your business day to day during 2023? YES NO
- Did you receive an Employee Retention Credit refund (ERC)? YES NO

Please provide a listing of all furniture, equipment and tools purchased for more than \$500 individually to be depreciated. List must include date purchased, description and purchase price.

Rental Properties: # of days used for personal _____ # of days rented or available for rent _____

Did you purchase or sell any rental properties in 2023? If so, please include Hud Settlement Statements.

Mileage: I have a mileage log that details date, time, place and purpose of travel, and outside verification.

Mileage log for 2023 # of miles for: Business _____ Commuting _____ Personal _____

Business Meals:

Amount paid for business/client meals, and while on business travels \$ _____

INCOME & EXPENSES:

Only complete the following section IF you are NOT providing us with a Profit & Loss statement, general ledger, or other accounting documents (including 1099's received), listing all income and expenses totaled by category.

2023 Total Business Income (including 1099's) \$ _____ (list each rental property separately)

Expense	Amount	Expense	Amount	Expense	Amount
Ex: Advertising					

Office in the Home:

When claiming an "Office in the Home" deduction, I verify the space designated as an office is used exclusively, one hundred percent, in 2023 for business. The space is a room with four walls, a door and access to a restroom.

_____ office sq. ft. _____ total sq. ft. of home

By signing below, I agree that all business, rental or farm income and expenses are accurately reported. I understand I am responsible for all other business tax obligations, not covered on this tax return. For the 2023 tax year, I verify that I have records, logbooks, receipts, and cancelled checks to validate both income and expenses, and will retain these records for the IRS required amount of time.

Owner _____

Date _____