

Byrd Accounting
www.byrdaccounting.biz

Questionnaire and Supporting Documentation for Small Business

Name

Social Security Number
or EIN Number

Business Address

Business Telephone

Business Website

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1. New Client: Please provide a description of your business. *(Type of work, product sold, service provided, hours of operation, where business conducted)*

2. Did you receive Form(s) 1099 MISC for the income reported? Yes No
If yes, please provide copy(s) of the Form 1099.

3. If you did not receive Form(s) 1099 MISC for the income reported, provide a copy of the record of income showing customer name. Also, include the social security number or employer identification number, if available.

4. Is a license a requirement of your occupation? No Yes
Do you have a business license? No Yes

5. How do you advertise for business?
 Newspaper Personal Computer Social Media Flyers
 Other *(Please explain)* _____

6. By law, you are required to keep adequate records. What type of records do you maintain to verify business income and expenses? *(Check all boxes that apply.) (Please submit copies.)*

- Accounting Records Computer Records Business Bank Accounts
- Paid Invoices/Receipts Business Stationery Insurance
- Advertising Car/Truck Expenses Rental Expense
- Log Books, mileage Ledgers Suppliers (name and address)
- Other *(Please specify)* _____

This is not an all inclusive listing. If you have other forms of documentation to support your business, please explain and submit copies of the documents.

7. Did you file state and/or local sales tax returns for the year?
