



Preparer Due Diligence – Business Owners/Sole Proprietors/Independent Contractors

**These questions are asked to serve as (more than) reasonable inquiries to satisfy Business Activity. These questions and inquiries are administered by the recommendation of a Former IRS Tax Attorney AND are asked outside of the standard Tax Software Package Questionnaire. **

Name of Business: _____

Is Your Business Structured as an LLC, Limited Partnership, S or C Corporation, etc.? _____

Does Your Company Have an EIN? _____

Is Your Company Filed with the Secretary of State? _____

Do You Have a Business Checking Account? _____

Do You Have any Bank Records? _____

Do You Your Business Have Any Bookkeeping (QuickBooks, Peachtree, etc.)? _____

Business Phone Number: _____

Business Fax Number: _____

Business E-Mail Address: _____

Social Media Links:

Facebook: _____

Twitter: _____

Instagram: _____

YouTube: _____

Explanation of Recording Business Income & Expenses:



2024 - PROFIT AND LOSS SUMMARY

Name of Business _____

Type of Business _____

Gross Sales/Receipts \$ _____

EXPENSES:

Advertising _____

Car and Truck _____

Commission and Fees _____

Contract Labor _____

Legal and Professional Services _____

Depreciation _____

Employee Benefit Program _____

Insurance (other than health) _____

Interests:

Mortgage (Paid to bank) _____

Other _____

Office Expense _____

Pension and Profit-Sharing Plans _____

Rent or Lease _____

• Vehicles, Machinery/ Equip _____

• Other Business Property _____

Repairs and Maintenance _____

Supplies _____

Taxes and Licenses _____

Utilities _____

Wages (Less employment credit) _____

Travel, Meals and Entertainment

Travel _____

Deductible meals and
entertainment _____

DATE VEHICLE PLACED IN SERVICE ____/____/____

MILAGE: BUSINESS _____ COMMUTING _____

OTHER EXPENSES (FOR EXAMPLE: Cell Phone, Phone, Fax, Printer, Uniforms, Etc.)

DESCRIPTION	AMOUNT	DESCRIPTION	AMOUNT
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

TNT Tax Office, LLC will prepare your 2024 individual tax return from the information you have provided. We will not audit or verify the information you furnished to us. You, the taxpayer, are ultimately responsible for the preparation and filing of your return.

I, the taxpayer named above, have provided to TNT Tax Office, LLC the tax information to the best of my knowledge and this information is true.

TAXPAYER'S SIGNATURE

DATE

SPOUSE'S SIGNATURE

DATE