



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:



2025 - PROFIT AND LOSS SUMMARY

Name of Business _____

Type of Business _____ Gross Sales/Receipts \$ _____

EXPENSES:

Advertising	_____	Office Expense	_____
Car and Truck	_____	Pension and Profit Sharing Plans	_____
Commission and Fees	_____	Rent or Lease	_____
		• Vehicles, Machinery/ Equip	_____
		• Other Business Property	_____
Contract Labor	_____	Repairs and Maintenance	_____
Legal and Professional Services	_____	Supplies	_____
Depreciation	_____	Taxes and Licenses	_____
Employee Benefit Program	_____	Utilities	_____
Insurance (other than health)	_____	Wages (Less employment credit)	_____
Interests:		Travel, Meals and Entertainment	
Mortgage (Paid to bank)	_____	Travel	_____
Other	_____	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
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

MOXY Tax Service will prepare your 2025 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 MOXY Tax Service the tax information to the best of my knowledge and this information is true.

TAXPAYER'S SIGNATURE _____

DATE _____

SPOUSE'S SIGNATURE _____

DATE _____