

Questionnaire and Supporting Documentation
Form 1040 Schedule C (Profit or Loss from Business)

This questionnaire lists the types of records you need to send us to prove your Schedule C income and expenses. The law requires you to keep adequate records to complete your Schedule C. Please review each line of this questionnaire and answer every question.

Return the questionnaire along with copies of your supporting documents.

Note: Failure to complete all parts of this questionnaire and submit the supporting documentation can delay the examination of your return and the final determination of your tax liability.

Name		Social Security Number
Business address		Year business started
Telephone Number	Business website (if applicable)	

1. Provide a description of your business (type of work, product sold, service provided, hours of operation, where business is conducted, etc.)

2. Provide a copy of your business license or permit if applicable

3. How do you advertise your business? If you pay for advertisement, submit copies of receipts or other proof of payment

4. Did you file state or local sales tax returns for the year

☐ Yes (provide copies) ☐ No ☐ Not applicable

5. Did you receive Forms 1099-MISC, 1099-NEC or 1099-K for the income reported

☐ Yes (provide copies) ☐ No

6. Provide copies of records to support the business income reported for any income you received not included on a Form 1099. Check all boxes that apply (below references are intended to be illustrative and don't constitute government endorsement of any private product, service, entity, or enterprise)

- ☐ Business/Personal bank account statements with business income highlighted
- ☐ Accounting records (e.g., QuickBooks, Peachtree)
- ☐ Electronic payment records (e.g., Apple Pay, PayPal, Zelle, Cash App)
- ☐ Logbooks/Ledgers
- ☐ Invoices/Receipts issued to customers for goods and services
- ☐ Other _____

7. Provide copies of records to support the business expenses reported. Check all boxes that apply (below references are intended to be illustrative and don't constitute government endorsement of any private product, service, entity, or enterprise)

- ☐ Invoices/Receipts received from suppliers for goods and services purchased
- ☐ Rental Contracts
- ☐ Business insurance contracts
- ☐ Electronic payment records (e.g., Apple Pay, PayPal, Zelle, Cash App) with expenses highlighted
- ☐ Mileage log and receipts for actual car/truck expenses
- ☐ Bank/Credit card statements with expenses highlighted
- ☐ Other _____

Information about Schedule C can be found in IRS Publication 334, Tax Guide for Small Business, and Publication 583, Starting a Business and Keeping Records. These publications can be downloaded from www.irs.gov/forms or can be requested by calling 800-TAX-FORM (800-829-3676).

For Paperwork Reduction Act Notice, see the Schedule C Instructions.

Statement of Self-Employed Income

(Please fill out this form if you have 1099-NEC, Farm, or Rental income)

Name: _____

SSN: _____

D/B/A (if any): _____

I have received the following income that has not been reported to me on any tax document. I understand that I am to report any income I receive accurately when filing my tax return. I have canceled checks, invoices, records, etc. to prove the information below:

Type of income (If using this form to claim nonemployee compensation please attach 1099-NEC)	Income amount
Total	

Expenses (Must itemize out list of expenses being claimed and attach documentation)	Expense Amount
Total	

I understand that it is a Federal offense and punishable by fine and/or imprisonment to report fraudulent income and expenses on my tax return. To the best of my knowledge and records this information is true.

Taxpayer Signature

____/____/____
Date