

**DAVID C. BRYANT, CPA -
2020 BUSINESS TAX RETURN QUESTIONNAIRE**

Please answer the following questionnaire for income tax purposes:

⇒ Do you need us to prepare any 1099s/1096s for 2020? YES NO

⇒ Please list vehicles below with year, model, make:

Business Owned	Mileage for year	Is there a mileage log that can be provided?
.....		<input type="checkbox"/> YES <input type="checkbox"/> NO
.....		<input type="checkbox"/> YES <input type="checkbox"/> NO

Personal Owned with business % usage	Mileage for year	Is there a mileage log that can be provided?
.....		<input type="checkbox"/> YES <input type="checkbox"/> NO
.....		<input type="checkbox"/> YES <input type="checkbox"/> NO

⇒ Did you purchase a vehicle in 2020? YES NO
 If YES, is it included in list below? YES NO

⇒ How many hours do you work in your business?
Please provide weekly average hours.

⇒ Does your spouse work in the business? YES NO
If YES and you are NOT paying them for their work please be aware that we may have to split income/expenses between you and your spouse OR consider you a partnership to comply with the IRS.

⇒ Did you operate in another state in 2020?
 (Employees or subcontractors paid in another state, sell goods or services in another state, etc) YES NO

⇒ Did you have a physical presence in another state in 2020?
 (Rent space, have an agent selling goods or services in that state, etc) YES NO

⇒ Does the company have a Health Insurance Plan? YES NO
 ⇒ Plan is titled in name of (circle): Company Shareholder/Member
 ⇒ Premiums are (circle): Paid by business Reimbursed by business

⇒ Does the company have a Retirement/Pension/Profit Sharing? YES NO
 ⇒ Type of Plan (circle): SIMPLE SEP 401K
 ⇒ Amount/ % of employer match:

⇒ Please provide separate listing of eligible employees.

⇒ Ending Inventory Count if applicable:.....
 ⇒ Supplies _____ Resale _____

**CONTINUED.....DAVID C. BRYANT, CPA -
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⇒Are you an officer, director, or shareholder of a foreign corporation, foreign-owned U.S. corporation, or foreign corporation engaged in a U.S. trade or business? YES NO

⇒ **If self-employed**, do you have an office you use **exclusively** for business in your home? YES NO

*If YES, please provide square footage of office..... AND square footage of total home.....
Also, please provide all related expenses for home (insurance, utility expense, etc)*

⇒ **If you are an S-Corporation or Partnership**, did you hold an annual meeting and keep minutes? YES NO

⇒ **If you are an S-Corporation or Partnership**, do you pay business expenses with personal funds? YES NO
⇒ *If YES, do you get reimbursed for these expenses through the business?* YES NO

2020 COVID 19 QUESTIONS

⇒**Did you receive Covid-19 Financial Aid?** YES NO

⇒If yes, what type of aid? (Circle) PPP Loan EIDL Grant EIDL Loan MD Grant(s) Other
If other, what did you receive?

⇒If yes to the above, have you discussed it with David C Bryant, CPA? YES NO

⇒Also, if yes to the above, please provide ALL documentation referencing Financial Aid.
This includes, but is not limited to, the following:

- Application Submitted
- Disbursement Date & Record of Disbursement (Bank Statement, Copy of Deposited Check, etc)
- Promissory Note/Loan Document Stating Terms (Loan Amount, Interest Rate, etc)
- Any Amounts Paid back

⇒If you received the PPP Loan, did you apply for Forgiveness? YES NO

⇒If no, did you want David C. Bryant, CPA's help to apply? YES NO

⇒If your business was significantly impacted by Covid-19 please explain below:

Signature

Date