

**DAVID C. BRYANT, CPA**  
**2021 BUSINESS TAX RETURN QUESTIONNAIRE**

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Please answer the following questionnaire for income tax purposes:

⇒ Do you need us to prepare any 1099s/1096s for 2021?  YES  NO

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

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

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

⇒ Did you purchase a vehicle in 2021?  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 2021?  YES  NO  
(Employees or subcontractors paid in another state, sell goods or services in another state, etc.)

⇒ Did you have a physical presence in another state in 2021?  YES  NO  
(Rent space, have an agent selling goods or services in that state, etc.)

⇒ Does the company have a health insurance plan?  YES  NO  
⇒ Plan is titled in name of:  Company  Shareholder/Member  
⇒ Premiums are:  Paid by business  Reimbursed by business

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

⇒ Please provide separate listing of eligible employees.

⇒ Ending Inventory Count if applicable:.....  
⇒ Supplies \_\_\_\_\_ Resale \_\_\_\_\_

⇒ 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  
⇒ Did ownership or business structure change during the year  YES  NO  
(Ex: Partner sold interest, changed from sole proprietor to S-Corporation, etc.)

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**2021 BUSINESS TAX RETURN QUESTIONNAIRE *CONTINUED***

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⇒ **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

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**2021 COVID-19 QUESTIONS**

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

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

⇒ 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

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date