

Melissa's Administrative Services

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Business/Entity Tax Interview Sheet

Name of Business _____ Responsible Party _____
 Phone Number _____ Responsible Party's SSN _____
 Email _____
 Address _____

Type of Business: C-Corp S-Corp Partnership Sole Proprietor QJV Rental

Do you have a partnership agreement or operating agreement? Yes No (If yes, provide a copy)

All businesses are required to maintain adequate records. Please indicate your method of record keeping:

QuickBooks Other accounting program Written general ledger Excel spreadsheet None

Accounting Method: Cash Accrual

List all states in which business was conducted last year _____

List all states in which you had sales last year _____

If you paid \$600 or more to any non-employee (e.g. Accountant, lawyer, carpenter, etc.) for services during the last year you may be required to file Form 1099. If you are unsure, please ask. There are penalties for non-compliance.

Did you make any payments that would require you to file Form 1099? Yes No

If yes, did you file the forms? Yes No

Would you like MAS to file these forms? (fees apply) Yes No

Kentucky requires an annual report if your business is incorporated or is an LLC. Corporations, LLCs, and non-LLC partnerships are also required to file a Personal Property Tax Return if they have property or inventory. The due date is May 15.

Would you like MAS to prepare your KY Annual Report and Personal Property Tax Return? (fees apply) Yes No

Did you receive any COVID relief? Please describe _____

PPP Employee Retention Credit EIDL Grant EIDL Loan Payroll Tax Deferral Other

GENERAL	YES	NO
Were any assets sold, retired, or converted to personal use last year?		
Does your business have inventory?		
Do you have an accountable plan for reimbursement of employee/owner expenses?		
If self-employed, do you have deductible health insurance premiums (including Medicare)?		
Did you receive a 1099-K for credit card payments?		
Did you use a home office regularly and exclusively for business?		
Did your business make any estimated tax payments to federal, state, or other authorities?		
How many employees does your business have?		
Did you use any personal assets (i.e. home computer, car phone, etc.) for business?		
Did you use any business assets for personal use?		

BANKING	YES	NO
Do you have a business account?		
Was all business income deposited into your business account?		
Were all business expenses paid for from your business account?		
Was your business account used only for business expenses (NO personal expenses)		
Are bank accounts, credit cards, and loans already reconciled?		
Did you contribute or withdraw money or loan to/receive a loan from your business?		

If you answer **NO** to either of the below questions, please explain.

	YES	NO
Do you have the required documentation for all deductions claimed, including date, amount, place, business purpose, parties involved, and business relationship of the parties for all meals, entertainment, travel, business auto, and business gifts deducted?		
Did you keep mileage logs? This is required by the IRS.		

Signature _____

Date _____