



DLR PROFESSIONAL SERVICES INC.

SELF-EMPLOYMENT & BUSINESS QUESTIONNAIRE

2125 WILLIAMSBRIDGE RD | INFO@DLRPROFESSIONALSERVICES.COM

BUSINESS PHONE: (929) 607-3875 | MOBILE BUSINESS: (917) 951-0244

1. Client and business profile

Client:

Tax year:

Complete one questionnaire for each business. Enter 0 where applicable; use N/A if a question does not apply.

Telephone

Email address

Legal business name and trade name (DBA)

EIN (if any)

Owner SSN / ITIN - last 4 digits only

Business address and state(s) where you operate

What do you sell or what services do you provide? Describe your daily work.

Business start date

Months active during this tax year

Business structure: sole proprietor, LLC, partnership, S corporation, corporation, or other

Is the business registered with a state or local agency?

☐ Yes

☐ No

☐ N/A

Does your occupation require a license or permit?

☐ Yes

☐ No

☐ N/A

Registration state, license / permit details, expiration, or pending applications



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2. Income and payment records

Client:

Tax year:

Income sources

Did you receive Forms 1099-NEC, 1099-MISC, or 1099-K?

☐ Yes

☐ No

☐ N/A

List customers, payers, platforms, or apps that paid you

Cash received \$

Checks received \$

Zelle / Venmo / Cash App / other \$

Cards / platforms / online sales \$

Total business receipts before expenses \$

Customer refunds / returns \$

Sales tax collected, if applicable \$

Other business income / tips / barter \$

Are any amounts included in more than one income record?

☐ Yes

☐ No

☐ N/A

Explain duplicated 1099 / bank amounts, loans, transfers, gifts, or owner deposits

Do you use a separate business bank account?

☐ Yes

☐ No

☐ N/A

Were there cash sales or payments missing from your records?

☐ Yes

☐ No

☐ N/A

How did you calculate income? Explain missing records or estimates and their basis.



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3. Business expenses and inventory

Client:

Tax year:

Enter annual business amounts only. Identify any personal portion; provide receipts and a category breakdown.

Expense summary - annual amounts in dollars

Advertising / marketing \$

Business rent / storage \$

Telephone / internet (business) \$

Legal / accounting / professional fees \$

Repairs / maintenance \$

Business travel (excluding commuting) \$

Employee wages / employer payroll taxes \$

Business interest \$

Inventory at beginning of year \$

Inventory at end of year \$

Supplies / materials \$

Utilities (business) \$

Business insurance \$

Software / subscriptions / licenses \$

Bank / platform / processing fees \$

Business meals - full amount paid \$

Independent contractors / subcontractors \$

Other expenses (attach detail) \$

Inventory purchases during year \$

Goods withdrawn for personal use \$



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4. Vehicles, home office, and assets

Client:

Tax year:

Vehicle use - attach details for extra vehicles

Vehicle year / make / model

Date first used for business

Owned or leased? Business use %?

Describe business trips / purpose

Total annual miles

Business miles

Commuting miles

Do you have a mileage log or other travel records?

☐ Yes

☐ No

☐ N/A

Vehicle costs paid: fuel, repairs, insurance, lease, interest, parking, and tolls

Home office

Was space in your home used regularly and exclusively for business?

☐ Yes

☐ No

☐ N/A

Office area (square feet)

Total home area (square feet)

Describe office use, dates, and costs paid (rent, utilities, insurance, repairs, etc.)

Equipment and other assets

List assets bought, sold, traded, or disposed of: description, dates, cost / proceeds, business use %



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5. Owners, workers, and business changes

Client:

Tax year:

List all owners / partners, ownership percentages, and changes during the year

Has a corporate tax election been filed or accepted?

☐ Yes

☐ No

☐ N/A

Entity tax year-end, election type / effective date, and IRS or state acceptance documents

Number of employees

Number of contractors

Did you run payroll or issue W-2 / 1099 forms?

☐ Yes

☐ No

☐ N/A

Describe worker duties, payments, forms issued, and any missing worker tax information

Did you collect sales tax or file sales / payroll tax returns?

☐ Yes

☐ No

☐ N/A

List states, filing frequency, balances due, or overdue filings

Owner contributions / loans to business \$

Owner draws / distributions \$

List business loans, year-end balances, and any debt forgiven or canceled

Any business purchase / sale / closure, new locations, foreign activity, or agency notices? Explain.



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6. Supporting documents and certification

Client:

Tax year:

Check each document provided and enter its quantity. Uncheck any box to correct a selection.

☐ 1099 forms	Quantity	
☐ Bank and credit card statements	Quantity	
☐ Income ledger / Profit and loss statement	Quantity	
☐ Receipts and invoices	Quantity	
☐ Mileage log	Quantity	
☐ Payroll, W-2, and contractor records	Quantity	
☐ Entity, election, and license records	Quantity	
☐ Prior tax return and asset schedule	Quantity	

Missing records / explanations / additional information (attach continuation pages if needed)

Client certification

I certify that the information and documents I provide to DLR Professional Services Inc. are true, complete, and accurate to the best of my knowledge. I have disclosed all business income, including cash and electronic payments, and identified personal expenses and estimates. I understand that deductions are subject to eligibility and supporting records; tax agencies may request proof or adjust the return. I will review my return before authorizing filing and retain my supporting records.

Client signature (hand or PDF signing tool)

Date

This questionnaire supports preparation and does not authorize filing or replace a signed tax return authorization.