

2021 BUSINESS QUESTIONNAIRE

CORPORATION, PARTNERSHIP, OR SCHEDULE C FILER



Name of Entity _____

AUTO MILEAGE DOCUMENTATION (WRITTEN RECORD REQUIRED)

NOTE: If the answer to #2 or #3 is no, you must recreate 3 months of auto logs before we can deduct any of your auto expenses.

	Yes	No
1 Is another vehicle available for personal use?		
2 Do you have evidence to support your mileage information reported above?		
3 If "Yes", is the evidence written in a log or other place?		

VEHICLE INFORMATION AND EXPENSES (WRITTEN RECORD REQUIRED)

		Vehicle 1	Vehicle 2
1	Auto Make, Model, & Year		
2	Total Miles in 2021 Jan 1 to Dec 31		
3	Business Miles in 2021 Jan 1 to Dec 31		
4	Commuting Miles		
5	Tabs (Required information)		
	Auto Loan Interest paid in 2021 (if-applicable)		
6	Was this vehicle purchased in this tax year? ■ If yes, please provide purchase agreement	___ Yes ___ No	___ Yes ___ No
7	Actual Expenses		
	Gas	\$ _____	\$ _____
	Oil	\$ _____	\$ _____
	Insurance	\$ _____	\$ _____
	Repairs/Maint.	\$ _____	\$ _____
	Other	\$ _____	\$ _____
	Lease Payments	\$ _____	\$ _____

Cell Phone Expense Allocation

Total Amount Paid \$ _____

Family/Other Use Portion \$ _____

Personal Use Portion \$ _____

Business Use Portion \$ _____

Example: Shirley has a family cell plan that she uses for business that costs her \$220 per month. \$20 of that \$220 is for Shirley's husband and son's extra lines. Of the remaining \$200, Shirley believes she uses the phone 20% (\$40) personally and 80% (\$160) for business. Here's how she would arrive at answers for this section.

Total Amount Paid: (\$220 x 12)	\$2,640
Family/Other Portion (\$20 x 12)	\$ (120)
Personal Use Portion: (\$40 x 12)	\$ (480)
Business Use Portion: (\$2,640-\$120-\$480)	\$2,040

Total Internet Expense (INTERNET PORTION ONLY - NOT TV)	\$ _____
What is the BUSINESSSS use percentage?	_____ %
Were payments made that required filing forms 1099?	Yes ___ No ___
If yes, were all required forms 1099 filed or will be filed?	Yes ___ No ___
Do you have retirement plan with over \$250,000 in assets?	Yes ___ No ___
Do you have other employees besides yourself?	Yes ___ No ___
Did you file State Sales Tax Returns?	Yes ___ No ___
Do you do business outside of MN?	Yes ___ No ___
If yes, which states?	_____
Did you sell/dispose of any assets in the corporate year?	Yes ___ No ___
What type of Retirement Plan do you have? (CHECK ONE BELOW)	
SEP IRA 401(k) SIMPLE IRA OTHER: _____	

Meals & Entertainment Detail	
(Employees = Individuals Other Than Owners)	
\$ _____	Office Party Meals for Employees
\$ _____	Business Meals
\$ _____	Travel Meals
\$ _____	Employee Meals at Office
\$ _____	Business Entertainment
TAX LAW CHANGES: THE TCJA CHANGED HOW MEALS & ENTERTAINMENT EXPENSES ARE DEDUCTIBLE FOR 2021. ABOVE DETAIL REQ.	