

Lockey & Pierce, CPAs
Certified Public Accountants And Financial Planners
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2022 BUSINESS INCOME TAX QUESTIONNAIRE

Business Name: _____

Address: _____

Address: _____

Contacts -- Bus. Phone: _____ Home Phone: _____ Cell Phone: _____

Email address: _____

Owner

Social Security # _____

Date of Birth _____

What is the business purpose? _____

Is the business operating as a sole proprietorship or limited liability company? _____

What is the business IRS identification number (EIN)? _____

Did the business purchase tangible products from out-of-state vendors and did not pay sales and use tax? Vendors such as Amazon and other vendors not registered in the state of the business? _____

If sub-contract labor was paid during 2021 for services performed for the business, were forms 1099-Misc issued? If not, do you have the IRS from W-9 completed as to sub-contract labor name, address, ID number, and entity type? _____

If the business owns tangible business assets, was the town or city's property list completed and filed with the Tax Assessor's office? If not, should one be filed? _____

For vehicles used for business, was a mileage diary or chart used to identify the 2022 miles driven for business? _____

Gross Business Income

What is the amount of 2022 gross income? _____

What 2022 income is reported on forms 1099-Misc. received from customers--payors? _____

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Lockey & Pierce, CPAs, -- 2022 Business Tax Questionnaire
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Miles For Activities, Work, Efforts, Time Spent For:

Miles

What is the round trip mileage from home to business location? _____

Miles for work related duties, errands, meetings, sales, working with customers
and vendors, performing job duties, and other work during work hours? _____

Miles for temporary work assignment at another work location? _____

Miles for work related education? _____

Miles for new ventures and new opportunities? _____

Miles for marketing, advertising, promotional work? _____

Miles for professional education, certificates, degrees, and personal development? _____

Miles for seeking to begin or purchase a new business? _____

Miles for seeking any investment or rental property opportunities? _____

Miles to manage or maintain any investments? _____

Miles related to National Guard or Reserve Member services? _____

Automobile Costs (Rate Method is 58.5 cents/mile--62.5 cents after June 30)

If you have miles for activities listed on page two, please list the following:

	<u>Vehicle 1</u>	<u>Vehicle 2</u>	<u>Vehicle 3</u>
<u>Auto year, make, and model</u>	_____	_____	_____
Odometer on 1/1/2022	_____	_____	_____
Odometer on 12/31/2022	_____	_____	_____
Total miles driven	_____	_____	_____
<u>Expenses</u>			
Auto rentals	_____	_____	_____
Cleaning, supplies, licenses	_____	_____	_____
Gasoline, oil, lubrication, etc.	_____	_____	_____
General repairs	_____	_____	_____
Insurance	_____	_____	_____
Loan or lease payments	_____	_____	_____
Parking fees and tolls	_____	_____	_____
Repairs: engine work	_____	_____	_____
Shocks, struts, undercarriage	_____	_____	_____
Tires, brakes, exhaust	_____	_____	_____
Tune-ups, oil changes, other	_____	_____	_____

Travel Expenses Overnight And Away For Business

Airline costs	\$ _____	Supplies	\$ _____
Meals/Entertainment	_____	Other	_____
Vehicle rentals/expense	_____	Days traveled	_____
Uber, lyft, bus, cabs, transport.	_____	For Guard or Reserve?	_____
Lodging, airbnb, other	_____		

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	<u>Amount</u>		<u>Amount</u>
<u>Business Office</u>		<u>Research & Knowledge</u>	
Desk top items/supplies	\$ _____	Books--subscriptions--magazines	\$ _____
Desk, chair, furniture	_____	Software and technology	_____
File cabinets, book cases	_____	On-line resources/other	_____
Furnishings, lighting, décor	_____	<u>Professional organizations</u>	
Radio, Alexa, Voice Assistant	_____	Dues/professional events	\$ _____
<u>Communications</u>		Social media	_____
Bus. use of home telephone	\$ _____	Professional licenses	_____
Separate business/fax lines	_____	Professional memberships	_____
Business cellphone usage	_____	<u>Job related apparel</u>	
Purchase telephones/cell?	_____	Specific work apparel & footwear	\$ _____
<u>Technology related</u>		Cleaning & maintenance	_____
Business related software	\$ _____	Protective apparel/equip.	_____
Computers & technology	_____	<u>Advertising/Marketing</u>	
Internet fees	_____	Print media, publications	\$ _____
Ipad, router, printers, modems	_____	On-line resources/other	_____
Paper, ink, & supplies	_____	Domain, website costs	_____
<u>Education</u>		Professional adver. fees paid	_____
Tuition, books, supplies	\$ _____	Direct mailers, other mailings	_____
Prof. development, coaching	_____	On-line appoint/referral source	_____
Internet/on-line courses	_____	<u>Supplies and other</u>	
Seminar fees, supplies, books	_____	Meals and entertainment	\$ _____
<u>Labor Costs</u>		Tools/equipment	_____
Sub-contract labor	\$ _____	<u>Business Savings Plans</u>	
Employee wages	_____	401(k) plan--safe harbor, solo, etc.	\$ _____
<u>Supplies and other</u>		SIMPLE-IRA	_____
Postage, mailing, shipping	\$ _____	SEP-IRA	_____
Printing, stationery, office supplies	_____	Traditional IRA or Roth IRA	_____
Business gifts	_____		
Liability insurance	_____		
Legal fees	_____		
Other professional fees	_____	Other costs for business?	\$ _____

Lockey & Pierce, CPA's, -- 2022 Tax Questionnaire
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Business Home Office Schedule

Square footage of office for business?	Total square footage of the home?	
<u>Mortgage, Taxes, Insurance</u>	<u>Repairs, Maintenance, & Utilities</u>	
_____ Mortgage interest #1	_____ General maintenance	_____ Carpeting/Flooring
_____ Mortgage interest #2	_____ Carpentry work	_____ Roofing or gutters
_____ Property tax	_____ Concrete/masonry	_____ Sidewalk/driveway
_____ Mortgage uninsurance	_____ Doors & windows	_____ Electric
_____ Fire & liability insur.	_____ Electrical & plumbing	_____ Gas, oil, other heat
<u>Other Expenses</u>	_____ Fences/boundary	_____ Rubbish
_____ Burglar/fire alarm	_____ Heating & cooling syst.	_____ Water & sewer
_____ Cleaning cost	_____ Landscaping	_____ Septic, well, other
_____ Equipment rental	_____ Lighting (interior, exter.)	
_____ Security	_____ Painting, siding	
_____ Service contracts	_____ Remodeling	

Massachusetts Small Business Issues

	Answer
Did the business hire a veteran who lives and work in Mass (\$2,000 for a qualified veteran)?	_____
Did you donate property to a non-profit for use in a Qualified Mass. Project? (credit is 50% or 65% of the donated amount)	_____
Did you participate in an economic development program? For the investment tax credit? (amount credit is determined by Economic Assistance Coordinating Council (EACC))	_____
Did you participate in a Certified Housing Development (credit is 25% of qualified project expenditures)	_____
Qualified expenditures of a qualified historic structure?	_____
Any lead paint removal related to residential properties?	_____
Any expenditures to clean/recover contaminated property?	_____

Rhode Island Small Business Issues

Contributions to scholarship organizations (RI-2276)?	_____
Expenditures for preservation of historic structures (RI-286B)?	_____
New job hiring qualified for the New Qualified Jobs Incentive Act 2015 (RI-6754)?	_____
Qualified expenditures for the Rebuild Rhode Island Tax Credit (RI-7253)?	_____
Qualified expenditures for the Musical & Theatrical Production Credits (RI-8201)?	_____
Expenses for new research and development facilities (Sec. 44-32-1)?	_____
Expenses for family education accounts (Sec. 44-30-25(f))?	_____
Expenses for tuition saving program (sec. 529 accounts) (Sec. 44-30-12(c))?	_____
Is the business an artist, writer, or composer in an Economic Development Zone?	_____
Any eligible employee wages under the Rhode Island Jobs Growth Act (Sec.42-64.11-4)	_____
Expenditures under the Tax Incentives For Employers (Sec. 44-55-4.1 RI-107)	_____
Does the business own and operate a qualified business facility in an Enterprise Zone?	_____