



Did you receive any other grants or loans, such as Economic Injury Disaster Loan (EIDL)? If yes, please provide information?

Did you make contributions to a business pension plan? YES NO  
If yes, how much and what type of plan? \_\_\_\_\_

Did you purchase any major pieces of equipment? YES NO If yes, please list.

New Equipment	Date of Purchase	Purchase Price

Do you have an office in your home? YES NO If yes, provide additional information below:

- Square Footage of Office \_\_\_\_\_
- Square Footage of Home \_\_\_\_\_
- Real Estate Taxes \_\_\_\_\_
- Mortgage Interest/Rent Pd. \_\_\_\_\_
- Homeowner's Insurance \_\_\_\_\_
- Utilities \_\_\_\_\_
- Repairs and Maintenance \_\_\_\_\_

Have you prepared (or will you prepare) all required Forms 1099? \* \_\_\_\_\_

*\*Please note - if you have paid more than \$600.00 to a contractor, you may be required to file a 1099-NEC with the IRS before the January 31 deadline. Late filing penalties are \$50.00 per late 1099. Please contact us if you need help in preparing these forms.*

I certify that I have listed all income and expenses; I have documentation to prove the figures entered on this worksheet.

Printed Name: \_\_\_\_\_ Date: \_\_\_\_\_

Signature: \_\_\_\_\_ Tax Year \_\_\_\_\_

Thank you for choosing Spinelli CPA, PC as your tax advisor. We value your business and are looking forward to working with you.

Sincerely,

Karen Spinelli, CPA  
President