

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