

Schedule C Interview Sheet

This must be completed by the tax preparer (Sun Loan Employee) for all returns with self-employment income. Fill out the **entire** form legibly. You must ask the taxpayer each question, verify responses, and collect legible documentation for the taxpayer's file.

Taxpayer Name _____ SSN _____ - _____ - _____

1. **Description of self-employment/business** (type of work, product sold, service provided, where your business is conducted, etc.)

2. **How long have owned this business or done this job?** _____

3. **Can you provide any documents to substantiate your business?**

Yes No (If No, we will be unable to prepare this return)

4. **What documents can you provide?** (Check all that apply)

Advertisements Business License Business Stationary Invoices

Receipts/Receipt Book Business Quotes Business Cards

Business Insurance Other – please describe: _____

5. **Who maintains the business records?** _____

6. **What records of income and expenses can you provide?** (Check all that apply)

Accounting Records 1099 NEC Car/Truck Expenses

Paid Invoices Ledgers/Logbooks Computer records

Business bank accounts Suppliers (names and addresses)

I, the undersigned, hereby certify that all the information provided on this form is true and correct.

Taxpayer Signature: _____ Date: _____

I verify the taxpayer provided the above documents.

Interviewer Signature: _____ Date: _____