

1099 and Sales Tax Questionnaire

Name / Type of the business:

Owner:

The CPA assigned to your return is:

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We would like Nelson CPAs, LLC to:

Prepare and file my 1099s: Yes No N/A
Prepare and file my sales tax: Yes No N/A
Prepare and file my use tax: Yes No N/A

If you answered NO to all the questions above:

- Sign and date below and return form to our office by January 8, 2021.
- Provide Nelson CPAs, LLC with copies of all Forms 1099 and the related Form 1096 along with your 2020 tax information. (Forms must be ordered from the IRS or purchased from an office supply store as they are not available online.)

If you answered YES to any of the above questions:

- Answer the questions below, then sign and date and return to our office by January 8, 2021.
- Supply the following information for each business or person you are required to send a Form 1099 (see attached worksheet):
 - A completed Form W-9 **OR** the name, complete mailing address, and tax identification number or SSN.
 - The total amount paid in 2020, not including any payments made with a major credit card.
 - Indicate if the payments were for rent or services.

1099s

We are required to answer the following two questions on your business tax return on your behalf. Please indicate how you want us to answer these questions.

1. Did your business make any payments in 2020 that would require it to file Form(s) 1099?
 Yes No
2. If "Yes", did or will the business file all required Form(s) 1099?
 Yes No

Sales and Use Tax

1. Are you required to file a Sales & Use Tax Return at least annually? Yes No
If "Yes", what is your MN ID #? _____
Provide us with gross sales & taxable sales necessary to file your return.

Or, do we file a Zero Return for 2020? Yes No

NOTE: All preparation and administrative fees will be charged to your business as a deductible expense.

Signature

Date