

1099 and Sales Tax Questionnaire

Name / Type of the business: _____

Owner _____

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 2023 that would require it to file Form(s) 1099? See information on IRS filing requirements for Forms 1099-NEC and 1099-MISC.

___ Yes ___ No

2. If "Yes," did or will the business file all required Form(s) 1099?

___ Yes ___ No

We would like Nelson Tax & Accounting 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 the form to our office by January 1, 2024.
- Provide Nelson Tax & Accounting with copies of all Forms 1099 and the related Form 1096 along with your 2023 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:

- Please answer the questions below, sign, date, and return to our office by January 1, 2024.
- 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 2023, not including any payments made with a major credit card.
 - Indicate if the payments were for rent or services.

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 2023? ___ Yes ___ No

2. Do you have a Minnesota Revenue account? ___ Yes ___ No

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

Signature

Date