

# Tax ID Max X- Bank Statement Income Questionnaire

To accurately assess your income using bank statements, you must complete the following questionnaire to the best of your knowledge.

Name: \_\_\_\_\_ Business Name: \_\_\_\_\_

1. Percentage of ownership in the business: \_\_\_\_\_

2. Business Organizational Type (check one option below)

- DBA
  Partnership
  LLC
  Corporation

3. Please describe the nature of your business, and how you generate income (please be specific):

4. Number of employees/contractors you pay: \_\_\_\_\_

5. Gross Annual Revenue: \_\_\_\_\_

6. Deposit methods of income (check all that apply)

- Paypal/ Zelle / Venmo  
 Check  
 Credit Card  
 Cash  
 Wire

7. Do you incur these expenses for your business? If you mark "No", please explain why it does not apply in space below

	Yes	No
a. Advertising	<input type="checkbox"/>	<input type="checkbox"/>
b. Space (Rent/Lease)	<input type="checkbox"/>	<input type="checkbox"/>
c. Payroll (wages paid other than to applicant)	<input type="checkbox"/>	<input type="checkbox"/>
d. Insurance	<input type="checkbox"/>	<input type="checkbox"/>
e. Cost of Goods Sold	<input type="checkbox"/>	<input type="checkbox"/>
f. General (Travel / Sales / Admin)	<input type="checkbox"/>	<input type="checkbox"/>

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Signature \_\_\_\_\_

Date \_\_\_\_\_

