



Business Income & Expences for the year of _____

Business name _____

Business Address _____

EIN # _____

Business Income:	
Private Resident Income	
State Income	
Room & Board Income	
Refunds paid	

Vehicle Info.	1	2	3
Model			
Cost			
Date Purchased			
Fuel			
Repair			
Other			
Business Milles Last Year			

Business Expenses:	
Accounting & Tax Preparation	
Advertising	
Bank Charges	
Business Insurance	
Beauty Care	
Dues & Subscription	
Contractor Labor(send Form 1099)	
Interest (credit cards,...)	
Janitorial	
Laundry & Cleaning	
Legal & Profesional	
Licence Fee & Cont. Education	
Office Expence	
Placement Agency	
Postage & Delivery	
Restaurants (with Clients)	
Rent machinery & equipment	
Rent Other	
Repairs & Maintenance	
Residents Activities	
Supplies Purchase (bath, kitch....)	
Taxes Paid in Advance (Estimated)	
Telephone - Cellphone	
Special Request Food	
Food for Residents (do not include personal)	
Health Insurance (monthly payments only)	
Doctors & Prescriptions	
Decorations	
Others misc.	

Business Equipment, Electronics & Furniture		
Description	Cost	Purchase Date

Other Notes

Business Use of Home			
	Where you Live	Other Homes	Other Homes
Total Sq/ft			
Sq/Ft for Business			
Mortgage Interest			
Property Tax			
House Insurance			
Repairs & Maintenance			
Landscaping			
Rent			
Cable			
Electric			
Gas			
Water			
Garbage			

Client Information - For the _____ Tax Year

Taxpayer

First name and initial
Last name
Social security no.
Occupation
Date of birth (m/d/y)
E-mail address

Spouse

First name and initial
Last name
Social security no.
Occupation
Date of birth (m/d/y)
E-mail address

Address

Street Address
Apartment number
City
State
ZIP code

Contact Info

Phone

Dependents

First name and initial
Last name
Social security no.
Occupation
Date of birth (m/d/y)
Relationship

Dependents

First name and initial
Last name
Social security no.
Occupation
Date of birth (m/d/y)
Relationship

Dependents

First name and initial
Last name
Social security no.
Occupation
Date of birth (m/d/y)
Relationship