

## Things we need to prepare your Income Tax Return

### Business Income & Expenses for the year of \_\_\_\_\_

Business name \_\_\_\_\_  
 Business Address \_\_\_\_\_  
 Employer Identification Number \_\_\_\_\_ Phone # \_\_\_\_\_

**Business Income:**

Gross receipts (private) \_\_\_\_\_  
 Other Income (received from state) \_\_\_\_\_  
 Total Income \_\_\_\_\_

**Business Expenses:**

Accounting & Tax Preparation _____	Telephone - Cellphone _____
Advertising _____	Uniforms, Safety Gear _____
Bank Charges _____	Restaurants (with Clients) _____
Business Insurance _____	Other Expenses:
Commission _____	Gifts & Promotions _____
Dues & Subscription _____	Safety Equipment _____
Sub-Contractors(send Form 1099) _____	Licences & Permits _____
Interest (credit cards,...) _____	Membership Fees _____
Janitorial _____	Food for Residents _____
Laundry & Cleaning _____	Residents Activities _____
Legal & Profesional _____	Pest Control _____
Licence Fee & Cont. Education _____	Continuing Education _____
Mischelaneous Expence _____	Beauty Care _____
Office Expence _____	Registered Nurse _____
Placement Agency _____	Company Meetings _____
Postage & Delivery _____	Car & truck expences:
Rent machinery & equipment _____	Vehicle name _____
Rent Other _____	Repairs & Maintenance _____
Repairs & Maintenance _____	Vehicle Insurance _____
Supplies Purchase (bath, kitch....) _____	Fuel & Oil change _____
Taxes Paid (Estimated) _____	Vehicle Interest _____
Telephone - Home _____	Milleage (business portion only) _____

### Assets

Purchase or Sale of Property that **lasts longer** than a year  
 (tools, furniture, electronics, equipment, appliences, car, etc.)

Description of Property	Cost	Date of Purchase	Date of Sale
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

**House Expences only**

Business Use of Home

Mortgage Interest	_____
Real estate taxes for House	_____
House Insurance	_____
Repairs & Maintenance	_____
House Decorations	_____
Security Fee	_____
Landscaping	_____
Rent	_____
Utilities	_____
Electricity	_____
Heat (gas, oil, wood)	_____
Garbage	_____
Water	_____
Cable	_____
Internet	_____
Other Expences	_____

If the house was used for **Both** residential & business then enter :

Business use area (square footage)	_____
Total area of home (square footage)	_____

**Additional Expences you may have**

Sales of Stocks or Bonds	_____
Health Insurance Premium (monthly payments only)	_____
Doctors & Prescriptions	_____
Health Coverage Documentation (Form 1095)	_____
Cash & Noncash Charitable Donation	_____
School Fees - 1098-T (not including 1st to 12 grade)	_____
Child Day Care expences (babysiting)	_____
Education Loan Interest	_____
State Income Tax Refund Amount	_____

**Additional Income you may have**

Form W-2	_____
Unemployment Income	_____
Interest & Dividend Income	_____
Social Security Income	_____
Pension or Retirement Income	_____
Rental Income and rental expences	_____

Please attach another sheet of paper if you have items not included on this page.  
Please bring a copy of your Last year Tax Return, Social Security Cards & Driver Licence

Client Information - For the \_\_\_\_\_ Tax Year

**Taxpayer**

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

**Spouse**

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

**Address**

Street Address	
Apartment number	
City	
State	
ZIP code	

**Contact Info**

Home phone	
Other 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	