

For Businesses that are Incorporated									
Date the business started, type of business, etc.									
Federal ID number									
Point of Contact/ Name of Tax Matters Person:									
Cell Phone#									
Business Phone #									
Business Address for Tax Return									
Name, Address and Social Security Number for stockholders									
% of stock for each stockholder									
E mail address									
Web Site or Social Media Site									
Copy of Prior Year(s) Tax Return(s)									
Year 2017 & 18									
If this is your first filing year: Copy of IRS Notice or Organization Confirmation letter									
Cash or Accrual Basis or do you know which?									
Did you have any payroll?? If so, Copy of forms W-3 & W-2(s) for the year									
Amount of Payroll Tax Owed at year end:									
Did you pay any individual or unincorporated business for services? If so, did you or will you file 1099s??									
If so, Copy of form 1096 summary for same year(s)									
Copy of Income Statement and Balance Sheet for Tax Year(s) OR backup copy of Database if QuickBooks...									
OR List the following:									
Total Cash Balances on last day of tax year									
Total Value of Assets on last day of tax year									
Total Amount due for any liabilities on last day of year									
Balance on any Notes or Loans Payable Owed also at year end									
Total Income for year(s)									
Business Expenses for year(s):									
Cell phone, business portion									

	internet service charges, business portion								
	Licenses, Contuning Education, State Annual fees								
	Insurance								
	Other outside service tha you paid for your business								
	Real Estate or other property tax paid								
	Dues, suscriptions, other fees								
	Meals and Entertainment limited to 50%								
	Auto Expenses:								
	Total miles put on vehicle for the year								
	Total BUSINESS miles put on vehicle for the year								
	Total Other Personal miles for the year								
	Rent, Utilities, and Other expenses for a place of business (NOT home)								
	Business Travel:								
	Lodging								
	Transportation								
	Meals								
	Other								
	Please break down each category								
	List any other ORDINARY and NECESSARY Expenses								