

Business Tax Preparation Worksheet

(Please complete for each business that a return needs to be filed on)

Legal Name of Business			
Address of Business			
City, State & Zip Code			
Email Address			
Phone Number			
EIN		Type of Business	
Contract Person			

Type of Corporation

Sole Proprietor		Partnership		S-Corporation		Corporation	
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Shareholder Information:

Name	Address	Social Security #	% of Ownership

Is this your 1st year filing for your business

Yes		No	
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If you have filed a business return previously, please make sure that you provide a copy of the previous year.

Do you use an account program or a CPA?

Yes		No	
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The following information will be needed. (If this information is on a P&L and Balance Sheet, I will not need an individual breakdown)

	Income		Payroll
	Expenses		Taxes
	Cost of Goods		Insurance
	Auto Expenses		Legal & Professional
	Bank Fees (including credit cards)		Repairs/Maintenance
	Dues/Subscriptions		Travel
	Advertising/Marketing		Meals
	Office Expense		Rentals
	Printing		Outside Services
	Postage		Materials/Supplies