

Business Income & Expenses Organizer		Tax Year:	
<p>This checklist is to be used as a guide and starting point for organizing <u>Self Employment</u> Business Income and Expenses and may not include all potential deductions or credits. If you have additional expenses or income, not included on the organizer that you feel could be used when preparing your income tax return, please document those in the NOTES section and discuss these with your tax preparer.</p> <p>Please verify the information for accuracy as this information will be included on your tax return that will be submitted to the IRS. Additionally, it is the responsibility of the tax payer to collect and retain all supporting documentation for your files.</p> <p>Please bring the completed organizer with you to your appointment. Should you have additional questions, feel free to contact us by email: <a href="mailto:dollartax@dollarincometax.com">dollartax@dollarincometax.com</a> or phone: 404-753-8048.</p>			
<b>Business Name</b>		<b>Federal ID #:</b>	
<b>Business Address:</b>		<b>Phone:</b>	
<b>City, State, Zip</b>		<b>Type of Business:</b>	
<b>Beginning Inventory:</b>		<b>Ending Inventory:</b>	
<b>Gross Income:</b>			

<b>Advertising</b>		<b>Travel *</b>	
Samples:		Bus/Taxi/Air Fees:	
Promotions/Gifts:		Lodging:	
Leads:		Mileage:	Document these expenses on
Newspaper/Flyers/Print:		Parking/Tolls:	Vehicle/Auto Expense Form
Radio/Television:		Other:	
Social Media/Web:			
Business Cards:		<b>Employment</b>	
Other:		Wages:	
		Payroll Taxes:	
<b>Communications</b>		Commissions:	
Phone (Land line):		Sub-contractor:	
Phone (Cell):		Other:	
Answering Service:			
Web Access:		<b>Insurance Expenses</b>	
Web Hosting/Domain:		Business Liability:	
Other:		Errors & Omissions:	
		Fire/Flood:	
<b>Postage/Shipping/Mailing</b>		Malpractice:	
Postage:		Surety Bonds:	
Delivery:		Other:	
Shipping Costs:		<b>Legal Fees</b>	
PO Box Rental:		Business Property Taxes:	
Other:		Bank Fees:	
		Licenses/Permit:	
<b>Utilities</b>		Bank Fees:	
Water/Sewage:		Other:	
Power:		<b>Operating Costs:</b>	
Sanitation:		Office Supplies:	
Security/Monitoring:		Software:	
Gas:		Other:	
Other:			

**Business Income & Expenses Organizer – Page 2****Tax Year:****Business Name****Trade Shows/Meetings:**

Meeting/Seminar Fee:

Promotional Events:

Demos:

Others:

**Other:**

Charitable Contributions:

Uniform &amp; Upkeep

Other:

**Equipment**

Tool Purchase (See below)

Rent /Lease:

Upkeep/Repair:

Other:

**Building/Maintenance:**

Rent/Lease:

Janitorial Fees:

Office Maintenance:

Other:

In this section, document any equipment purchases related to the conduct of business.

**Equipment****Date of Purchase:****Cost****Preparer Notes:****Reviewed by:****Date:**