

Business Income & Expenses Organizer

Tax Year:

This checklist is to be used as a guide and starting point for organizing Self Employment Business Income and Expenses and may not include all potential deductions/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.

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 taxpayer to collect and retain all supporting documentation for your files.

Please bring the completed organizer with you to your appointment. Should you have additional questions, feel free to contact us by email: dollartax@dollarincometax.com or phone: 404-753-8048.

Business Name		Federal ID #:	
Business Address:		Phone:	
City, State, Zip		Type of Business:	

Gross Income:			
Beginning Inventory:		Purchases:	Ending Inventory:

Advertising:		Travel:	
Samples:		Bus/Taxi/Air Fees:	
Gifts:		Lodging:	
Promotions:		Mileage:	Document these expenses on Vehicle/Auto Expense Form
Leads:		Parking/Tolls:	
Print Advertising:		Meals (While working out of Town):	
Radio/Television:			
Social Media /Web:		Employment:	
Business Cards:		Wages:	
Other:		Payroll Taxes:	
Communications:		Commissions:	
Phone (Land line):		Sub-contractor:	
Phone (Cell):		Other:	
Answering Service:			
Internet Access:		Insurance Expenses:	
Website Hosting/Domain:		Business Liability:	
Other:		Errors & Omissions:	
		Fire/Flood:	
Postage/Shipping/Mailing:		Malpractice:	
Postage:		Surety Bonds:	
Delivery:		Business Building Insurance:	
Shipping Costs:		Business Equipment Insurance:	
PO Box Rental:		Legal Fees:	
Other:		Business Property Taxes:	
		Licenses/Permits:	
Utilities (For Business):		Bank Fees:	
For In-Home Office See In-Home Office Organizer		Business Credit Card:	
Water/Sewer		Loan Interest:	
Power:		Operating Costs:	
Sanitation:		Office Supplies:	
Security/Monitoring:		Software:	
Gas:		Materials/Job Supplies:	
Other:		Other (Specify):	

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Trade Shows/Meetings with CLIENTS:		Equipment:	
Meeting/Seminar Fee:		Tool Purchase (See below)	
Promotional Events:		Rental /Lease:	
Demos:		Upkeep/Repair:	
Business Meals:		Interest on Equipment Loans:	
Other:		Other:	
Other Expenses:		Building/Maintenance (For Business):	
Uniform & Upkeep:		***For In-Home Office See In-Home Office Organizer***	
Other:		Rent/Lease:	
Other:		Janitorial Fees:	
		Office Maintenance:	
		Mortgage Interest:	
		Other:	

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

Equipment:	Date of Purchase:	Date In Service:	Cost:

Additional Notes:	
Preparer Signature:	Date: