

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: dollartax@dollarincometax.com or phone: 404-753-8048.</p>			
Business Name		Federal ID #:	
Business Address:		Phone:	
City, State, Zip		Type of Business:	
Beginning Inventory:		Ending Inventory:	
Gross Income:			

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

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Business Name	
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Trade Shows/Meetings:		Equipment	
Meeting/Seminar Fee:		Tool Purchase (See below)	
Promotional Events:		Rent /Lease:	
Demos:		Upkeep/Repair:	
Others:		Other:	
Other:		Building/Maintenance:	
Uniform & Upkeep		Rent/Lease:	
Other:		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:
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