

SYNTAX

BUSINESS TAX INFORMATION WORKSHEET

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Gross Receipts

Cost of Goods (Inventory)

Total Income

Legal Structure

Business type

Date of Start Up

Federal Tax ID (if applicable)

SOS# (if applicable)

Primary Contact

Direct Deposit Bank Name

Routing Number

Account Number

BUSINESS INFORMATION

Business Legal Name

Business Address

City ST ZIP

Personal Contact No Email Address

BUSINESS OWNER 1

First Name Last Name

Home Address (if different from Business address)

City ST ZIP

Personal Contact No Email Address

BUSINESS OWNER 2

First Name Last Name

Home Address (if different from Business address)

City ST ZIP

Personal Contact No Email Address

BUSINESS VEHICLE #1

MFG	TYPE	YEAR
Date placed in Business Service		
Business Mileage		Ending Mileage
Lease/Own		
Purchase/Lease Price (Basis)		Monthly Note

BUSINESS VEHICLE #2

MFG	TYPE	YEAR
Date placed in Business Service		
Business Mileage		Ending Mileage
Lease/Own		
Purchase/Lease Price (Basis)		Monthly Note

BUSINESS VEHICLE #3

MFG	TYPE	YEAR
Date placed in Business Service		
Business Mileage		Ending Mileage
Lease/Own		
Purchase/Lease Price (Basis)		Monthly Note

Payroll

(W2 and 1099NEC Employees)

Commissions/Bonuses**Contract Labor**

(1099MISC and CASH)

Employee Entitlements

(Insurances, Coverages)

Legal / Professional Fee's**Equipment Rental / Lease****Business Insurance**

Liability / Errors & Emissions

Taxes and Licenses

Bank Fee's / Business Interest Paid		
Office Lease or Mortgage Annual Total		
Business Use of Home Percentage (TTL Home Sqft % Space Used)		
Office Furniture /Equipment		
Office Technology (Pc's Laptops, Printers etc)		
Software Subscriptions and Purchases		
IT Services Cost (Networking, Repairs etc)		
Advertising/Marketing		

Office Supplies

**Utilities (Gas – Alt Fuels –
Electricity)**
(for Home use get percentage of
annual cost)

MFG or Processing Materials

DSL / Internet Services

Landline/ Cell Services

Business Travel

Business / Entertainment

Misc Business Expenses