



DELUXE TAX AND FINANCIAL | WWW.DELUXETAXFINANCE.COM | 817-527-1192

Business Information

- ☐ Business Name And Information
- ☐ Bank Information (For Direct Deposit)
- ☐ Transcript or Copy of Prior Year Return
- ☐ Estimated Tax Payments

Income, Revenue, Other

- ☐ Gross Receipts From Income/Revenue
- ☐ Bank Statements
- ☐ Other

To Maximize Your Refund We Recommend You Include Any Of The Expenses You Incurred That Can Be Filed As A Credit Or Deduction. See The List Below For Several Options.

Deductions/Credits

- ☐ Startup Costs - costs incurred to start business market research, advertising and legal fees. IRS allows up to \$5k in startup cost deductions in first year of business
- ☐ Rent
- ☐ Utilities (Light, Water, Internet, Cable)
- ☐ Supplies
- ☐ Marketing/Advertising
- ☐ Health Insurance Payments
- ☐ Business/Legal Fees (Lawyer, Accountant, Consultant)
- ☐ Monthly Fees, Subscriptions (Domain, Website, Software, etc.)
- ☐ Money Paid for Prior Year Tax Prep
- ☐ Interest on business loans
- ☐ Self Employment tax
- ☐ Home Office - rent, mortgage, utilities, phone, a portion of expenses can be deducted based on the percentage of home used exclusively for business
- ☐ Meals - generally deduct 50% of business related meals
- ☐ Bank/Credit Card Fees