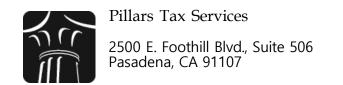


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INCOME TAX ORGANIZER

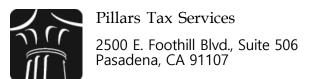
		ONFIDENT	I I A L	INFOR	MATION	V			
Taxpayer I	ntormation	1		1.			T		
SSN	First Name & MI			Last Name			Birth Date		
Spouse Inf	ormation			I			1		
SSN		First Name & MI		Last Name	Last Name		Birth Date		
NOTE TO OUR VALUED CLIENTS: <u>Please fill out or update your e-mail address & cell phone numbers!</u> If there are NO changes to the below information, there is no need to fill out the remaining part of this page.									
Filing Status (Pl	ease Check One)								
1-Sir	ngle 🗌 2-Ma	rried Joint 🔲 3-1	Married Filir	ng Separate [4-Head c	of Househol	d 5-Widow/er		
Street Address									
City			State		Zip Code				
Work Phone (with area code)				Home Phone (with area code)					
Work Priorie (with area code)				nome rhone (with area code)					
Email Address				Cell Phone					
Taxpayer	axpayer			Election		Election F	und Yes No		
Spouse	Occupation			Election		Election F	und? Yes No		
1									
		DEPENDE	N T I	NFORM	ATION				
First Name		Last Name		SSN	Date	of Birth	Relationship		
							1		
	I	RS REFUN	D – D	IRECT	DEPOS	ΙT			
		(Please submit a vo	oidad chack	to our office:	for accuracy)				
Thic-Voor Ro	ank Interest Inco	ome \$				fund \$			
and true. I/V as prescribed	version, it we herein We also solemnly d by the Internal	by certify that ALL in declare that all of th Revenue Service (IR)	nese inform S).	ation are supp	orted by rece	ipts and oth	ner documentation		
Check this box if you DO NOT want to receive other financial service offers from our affiliated companies									
Signature				Date					
6:				Date					
J									



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SUMMARY OF BUSINESS EXPENSES

Taxpayer Name:		Business Code:			
Business Address:					
City:	State:	Zip:			
Principal Business or Profession:					
Business Name:		Employer ID #:			
SOURCES OF INCOME		CAR & TRUCK EXPENSES (ACTUA	AL)		
Gross Receipts or Sales	\$	Gasoline & Oils	\$		
Cost of Goods Sold	\$	Repairs & Tires	\$		
Gross Profit	\$	Auto Insurance	\$		
Non-Employee Comp (1099)	\$	Business Car Tax & Licenses	\$		
Total Business Income	\$	Car Rental Fees	\$		
		Depreciation Expense (4562)	\$		
ADVERTISING EXPENSES		Total Car Lease	\$		
Photocopy of Pamphlets	\$	Total Actual Receipts	\$ \$		
Signs / Billboards / Business Cards	\$		¥		
Misc. Advertising Expenses	\$	CAR & TRUCK EXPENSES (MILEA	GE / YR)		
Total Advertising Expenses	\$	Date Placed in Service			
		Business Miles (Business Use)			
OPERATING EXPENSES		Daily Commuting Miles			
Wages & Salaries	\$	 Total Commuting Miles 			
Business Utilities/Cables	\$	Total Yearly Mileage			
Business Taxes & Licenses	\$	<u> </u>			
Repair & Maintenance (Equip)	\$	TRAVEL & TRANSPORTATION			
Commissions / Fees Paid	\$	Travel away from home	\$		
Employee Benefits	\$	Other Business Expenses	\$		
Bad Debts from Services	\$	Plane Tickets	\$		
Insurance	\$	Taxi / Bus Fares	\$		
Business Bldg. Mortgage Interest	\$	Hotel / Lodging	\$		
Business Legal & Prof. Fees	\$	Tips & Laundry	\$		
Pension & Profit Sharing	\$	Total Travel Expenses	\$		
Bus Rent/Lease Machine/Equip	\$	Meals & Representation	\$		
Bus Rent/Lease Bus. Property	\$	Parking & Tolls	\$		
Misc. Expenses (Specify)	\$		INICEC		
DEPRECIATION EXPENSES		CHILD & DEPENDENT CARE EXPENSES Provider Name			
Asset Name		CCNI / FFINI			
Date of Original Purchase	-				
Original Purchase Price	\$	Phone #			
Date Placed in Business	·	Child Name			
2 4.6 . 14664 HT 243H1633	Ŧ	Amount Paid	\$		
Dranarad Dv		Data			
Prepared By		Date			



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SUMMARY OF BUSINESS EXPENSES

Taxpayer Name:		Telephone:		
OFFICE EXPENSES		NEW EQUIPMENT PURCHASED		
Marketing Membership Fee \$		Computer (Laptop / Desktop)	\$	
Temporary Help	\$	Fax Machine	\$	
Office Furnishings	\$	Photocopy Machine	\$	
Internet & Accounting	\$	Desk Calculators	\$	
Home / Office Improvement	\$	Furniture	\$	
Postage & Courier	\$	Filing Cabinets	\$	
Notary / Bank Charges	\$	Other Equipment	\$	
Miscellaneous Office Expenses	\$			
Total Office Expenses	\$	BUSINESS USE OF HOME		
OFFICE OF DDA ACC		Area used for business		
OFFICE SUPPLIES	¢	Total area of home	<u></u>	
Business Cards Rusiness Cifts (\$25 Fach)	Ф ф	Home Mortgage Interest Real Estate Taxes	Φ	
Business Gifts (\$25 Each)	ф 		φ	
Office / Computer Supplies	.	Homeowner's Insurance	ф	
Forms / Printing / Photocopies	ф 	House Repairs & Maintenance	φ	
Books & Magazines	*	Gas & Utilities	>	
Miscellaneous Supplies	*	Rental Expenses	\$ 	
Total Supplies Expenses	>	House Fair Market Value	>	
OTHER EXPENSES		Value of Land Date first used	\$ 	
Office Rental Expenses	\$	Date inst used		
Phones & Pagers	\$			
Seminar / Training Fees	\$	RENTAL PROPERTY EXPENSES		
Other Business Expenses	\$	Advertising	\$	
Total Other Expenses	\$	Auto and Travel	\$	
RENTAL PROPERTY INCOME		Cleaning & Maintenance	\$	
Dranart Addrass		Insurance / HOA	\$	
			\$	
		Martagas Interest	\$ \$	
Gross Receipts Received	\$		\$	
Royalties	\$	Taxes	\$	
Other Rental Income	\$	Utilities	\$	
Total Rental Income	\$	Other Rental Expenses	\$	
Prepared By		Date		