

Mid-America Tax

Business Owner Tax Organizer

TAX YEAR

Company Information:

Legal Type of company?

Owner Name:		Social Security No.: ____ - ____ - ____	
Business Name:		EIN/FIN: ____ - ____	
Business Address:	City:	State:	Zip:
Contact Name:		Email:	
Work Phone:	Home Phone:	Cell Phone:	
Contact Address:	City:	State:	Zip:

Business Income and Expenses:

You do NOT need to complete this form if you are using Quickbooks or an accounting program and provide us with a Profit & Loss Statement for the end of the year.

Income:

\$	Total Income Reported NOT 1099-Misc, NEC's or 1099-K's
\$	Total Income Reported on 1099-Misc, or NEC's
\$	Total Income Reported on 1099-K's
\$	Miscellaneous Income from other sources

Cost of Goods Sold (If you carry inventory):

\$	Total dollar amount of all inventory at the beginning of the year
\$	Total dollar amount of all purchases for the year
\$	Total dollar amount of all inventory at the end of the year

****Total Payments to Sub-Contractor Exceeding \$600 each for the year REQUIRE Form 1099 be Filed with IRS**

Expenses:

\$	Advertising (brochures, ads, business cards, flyers, signs)
\$	Safety Equipment & Uniforms
\$	Wages (paid to employees via W-2)
\$	**Subcontracted Labor (paid to non-employees 1099-Misc or 1099-NEC)
\$	Insurance (business insurance, liability, worker's comp., bonds, etc.) * NOT VEHICLE OR HEALTH *
\$	Interest Paid on a business loan
\$	Legal/Professional Fees (lawyer, tax preparer, consultants)
\$	Office Supplies (pens, paper, staples, etc.)
\$	Rent or Lease (office rent, storage rent)
\$	Equipment/Machinery Rental (for business use)
\$	Equipment/Machinery Purchase (for business use)
\$	Tools (small tools needed to run the business)
\$	Repairs / Maintenance (computers, or equipment for office)
\$	License (fees paid - business related)

\$	Travel Expenses (car rental, air travel, tolls, parking fees
\$	Meals (meals related to business meetings)
\$	Entertainment (business related meetings)
\$	Utilities (gas, electricity, business related)
\$	Phone (Business portion only)
\$	Internet (Business portion only)
\$	Gifts to Clients/Customers
\$	Postage and Shipping
\$	Bank Fees and Charges
\$	Materials used in business
\$	Website
\$	Tax Prep Cost - The amount that applied to the Business portion of your tax return
\$	Other:
\$	Other:

Major Purchases (Not included in any catagory above) Over \$1000:

\$	Item:	Purchase Date:
\$	Item:	Purchase Date:
\$	Item:	Purchase Date:

Total Business Miles:	Vehicle #1		Vehicle #2	
Date Vehicle Placed in Service				
Vehicle Year, Make and Model				
Odometer Reading on January 1 st				
Odometer Reading on December 31 st				
TOTAL mileage driven during the year				
Business Mileage driven during the year				
Business parking fees & tolls	\$		\$	
Was another vehicle available for personal use?	Yes	No	Yes	No
Do you have evidence to support your deduction?	Yes	No	Yes	No
Is the evidence you have written evidence?	Yes	No	Yes	No

Business Use of Home:

	Square Footage Used Exclusively for Business Office/Storage
	Square Footage of Home
\$	Original Cost of Home + Cost of Subsequent Improvements
\$	Deductible Home Mortgage Interest Form 1098
\$	Real Estate Taxes Paid
\$	Insurance
\$	Rent
\$	Repairs and Maintenance
\$	Total Utilities (Gas, Water, Sewer, Electric, Trash, etc
\$	Other Expenses (Security, HOA, Pest Control, etc.)
\$	Other:
\$	Other: