

## Business Tax Organizer

TAX YEAR

Company Information:

Legal Type of company?

Owner Name:	<input type="text"/>	Social Security No.:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Business Name:	<input type="text"/>	EIN/FIN:	<input type="text"/>	<input type="text"/>	
Business Address:	<input type="text"/>	City:	<input type="text"/>	State:	<input type="text"/>
Contact Name:	<input type="text"/>	Email:	<input type="text"/>		
Work Phone:	<input type="text"/>	Home Phone:	<input type="text"/>	Cell Phone:	<input type="text"/>
Contact Address:	<input type="text"/>	City:	<input type="text"/>	State:	<input type="text"/>

### 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:

\$ <input type="text"/>	Total Income Reported NOT 1099-Misc, NEC's or 1099-K's
\$ <input type="text"/>	Total Income Reported on 1099-Misc, or NEC's
\$ <input type="text"/>	Total Income Reported on 1099-K's
\$ <input type="text"/>	Miscellaneous Income from other sources

#### Cost of Goods Sold (If you carry inventory):

\$ <input type="text"/>	Total dollar amount of all inventory at the beginning of the year
\$ <input type="text"/>	Total dollar amount of all purchases for the year
\$ <input type="text"/>	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:

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

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

\$	Item	<u>Purchase Date</u>
\$	Item	<u>Purchase Date</u>
\$	Item	<u>Purchase Date</u>

Do you have a business vehicle to deduct expenses for?

Do you use an office in your home that you would like to deduct? You must read IRS Form 8829 Instructions to see if you qualify. You will find that form on our website under the Tax Organizers tab.

For either of these additional deductions, go to our website, Tax Organizers tab and select Mileage Expense & In Home Office Worksheet.