

TOMMY DO INCOME TAX & FINANCIAL SERVICES

SMALL BUSINESS TAX ORGANIZER

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GENERAL BUSINESS INFORMATION

Name of Business _____ Owner _____ EIN or SS # _____
 Type of Business (Industry) _____ Business Phone # _____ Email _____
 Business Address _____ City _____ State _____ Zip _____
 Sole Proprietor S-Corp C-Corp LLC Partnership Accounting Method: Cash Accrual

INCOME & EXPENSES

TOTAL INCOME *(1099's plus other revenue)* _____
 Less Returns and Allowances _____
EXPENSES
 Advertising _____
 Automobile Expense *(complete section to right)* _____
 Bank Service Charges _____
 Cleaning & Janitorial _____
 Commissions/Independent Contractors _____
 Computer & Internet Expenses _____
 Dues & Publications _____
 Education & Seminars _____
 Employee Benefit Programs _____
 Insurance (business liability, workers comp) _____
 Health Insurance _____

 Interest *(business related)* _____
 Legal & Professional Fees _____
 Licenses & Permits _____
 Meals (out of town & client meetings) _____
 Office Supplies & Expenses _____
 Postage & Freight _____
 Rent/Lease Business Property _____
 Repairs & Maintenance _____
 Supplies _____
 Taxes _____
 Travel & Lodging _____
 Telephone _____
 Tools Replacement _____
 Uniforms _____
 Utilities _____
 Wages & Salaries Paid Out _____
 Other Expenses (please list) _____

COST OF GOODS SOLD
 Product Purchased for Resale _____
 Product Used for Personal Use _____
 Materials and Supplies _____
 Contract Labor _____
 Beginning Inventory _____
 Ending Inventory _____

BUSINESS USE OF VEHICLE

Vehicle Description _____
 Date Vehicle was Placed in Service _____
 Original Purchase Price or Other Basis _____
Mileage *(all fields required)*
 Business Miles _____ mi.
 Commuting Miles _____ mi.
 Other Personal Miles _____ mi.
 Total Miles _____ mi.

Actual Expenses Paid
 Gasoline & Oil _____
 Repairs, Tires, Car Washes _____
 Auto Insurance _____
 Registration Fees _____
 Vehicle Loan Interest _____

OFFICE IN HOME EXPENSES

Area Used Exclusively for Business _____ sq. ft.
 Total Area of Home _____ sq. ft.
 Mortgage Interest _____
 Property Taxes _____
 Mortgage Insurance _____
 Homeowners Insurance _____
 Rent _____
 Repairs & Maintenance _____
 Utilities _____
 Other Expenses _____