



BUSINESS CLIENT INFORMATION

LEGAL BUSINESS NAME _____ DATE INCORPORATED _____

EIN _____ TYPE OF ENTITY: SOLE PROP PARTNERSHIP LLC S-CORP CORP NON-PROFIT

TYPE OF BUSINESS _____ ACCOUNTING METHOD: CASH ACCRUAL

STATE OF INCORPORATION _____ STATE TAX ID # _____ DO YOU SELL: PRODUCTS SERVICES

ADDRESS _____ SUITE # _____

CITY _____ STATE _____ ZIP _____ PHONE _____

MAIN CONTACT NAME _____ CONTACT EMAIL _____

OWNERSHIP INFORMATION

NAME	HOME ADDRESS	SSN	OWNERSHIP %	PRIOR YR ENDING BASIS

GROSS RECEIPTS

DID YOU RECEIVE ANY OF THE FOLLOWING DOCUMENTS: 1099-MISC 1099-K K-1 OTHER: _____

DO YOU HAVE ANY OTHER INCOME NOT REPORTED ON THE ABOVE FORMS? YES NO

IF YES, PLEASE LIST YOUR GROSS RECEIPTS: _____ DO YOU HAVE WRITTEN DOCUMENTATION: YES NO

HOW DO YOU DETERMINE YOUR GROSS RECEIPTS? _____

EMPLOYEE / CONTRACTOR INFORMATION

DID YOU PAY ANYONE TO WORK FOR YOU? YES NO ~~IF YES~~ IF YES, DID YOU ISSUE: W-2 1099-MISC

VEHICLE INFORMATION - DRIVING TO AND FROM WORK IS CONSIDERED COMMUTING AND GENERALLY IS NOT DEDUCTIBLE.

DID YOU USE YOUR VEHICLE FOR BUSINESS PURPOSES? YES NO - IF YES, CONTINUE BELOW.

VEHICLE YEAR _____ MAKE _____ MODEL _____ STANDARD MILEAGE ACTUAL EXPENSES

PURCHASE PRICE _____ PURCHASE DATE _____ DATE PLACED IN SERVICE _____

LAST YEAR'S MILES: TOTAL _____ BUSINESS _____ COMMUTING _____ PERSONAL _____

WAS THE VEHICLE AVAILABLE FOR PERSONAL USE DURING OFF-DUTY HOURS? YES NO

WAS ANOTHER VEHICLE AVAILABLE FOR PERSONAL USE? YES NO

DO YOU HAVE WRITTEN DOCUMENTATION, SUCH AS A LOG BOOK, TO SUPPORT YOUR MILEAGE AND VEHICLE EXPENSES? YES NO

INVENTORY INFORMATION

DID YOU HAVE INVENTORY? YES NO - IF YES, CONTINUE BELOW.

WHAT WAS LAST TAX YEAR'S ENDING INVENTORY AMOUNT? _____ ~~IF YES~~ THIS YEAR'S ENDING INVENTORY: _____

TOTAL PURCHASES FOR THIS YEAR _____ PURCHASES USED FOR PERSONAL USE _____ COST OF LABOR _____

SUMMARY OF EXPENSES – IF YOU ARE PROVIDING A P&L OR SPREADSHEET, CHECK HERE AND CONTINUE TO THE NEXT SECTION.

ACCOUNTING	_____	OFFICE SUPPLIES	_____
ADVERTISING	_____	POSTAGE	_____
CONTINUING EDUCATION	_____	PROPERTY RENT	_____
CONTRACT LABOR	_____	BUSINESS TRAVEL	_____
BANK CHARGES	_____	BUSINESS MEALS	_____
INTEREST EXPENSES	_____	PARKING & TOLLS	_____
CREDIT PROCESSING FEES	_____	TAXES – PAYROLL	_____
LEGAL & PROFESSIONAL FEES	_____	TAXES – PROPERTY	_____
DUES AND SUBSCRIPTIONS	_____	TAXES – OTHER	_____
LICENSES, PERMITS & FEES	_____	UTILITIES – GAS	_____
INSURANCE (NON-AUTO)	_____	UTILITIES – ELECTRIC	_____
OUTSIDE SERVICES	_____	UTILITIES – TELEPHONE	_____
CLEANING / JANITORIAL	_____	UTILITIES – INTERNET	_____
UNIFORMS	_____	UTILITIES – SECURITY	_____
REPAIRS AND MAINT. (NON-AUTO)	_____	UTILITIES – OTHER	_____
EQUIPMENT RENTAL	_____	SMALL TOOLS	_____
_____	_____	_____	_____

FIXED ASSETS

DID YOU PURCHASE ANY FIXED ASSETS THIS YEAR? YES NO – IF YES, CONTINUE BELOW OR ATTACH DOCUMENTATION:

ITEM DESCRIPTION	DATE PLACED IN SERVICE	COST OR BASIS	% OF BUSINESS USE	NOTES

DID YOU SELL OR DISPOSE OF ANY FIXED ASSETS THIS YEAR? YES NO – IF YES, CONTINUE BELOW OR ATTACH DOCUMENTATION:

ITEM DESCRIPTION	DATE SOLD / TAKEN OUT OF SERVICE	SALES PRICE	SALES EXPENSES	NOTES

I CERTIFY THAT I AM THE REGISTERED AGENT FOR THE ABOVE COMPANY AND WOULD LIKE THE COMPANY AND/OR MY PERSONAL TAXES PREPARED ACCORDING TO THE INFORMATION SUPPLIED ABOVE. ALL INFORMATION IS TRUE AND CORRECT AND I TAKE FULL RESPONSIBILITY FOR THE INFORMATION PROVIDED AND THE FINAL PRODUCT AS I DIRECT IT TO BE FILED.

SIGNATURE _____ TITLE _____ DATE _____