



Business Tax Organizer

Referral Name:

Tax Year: _____

** DOWNLOAD this document to your device in order to save any info you input. **

New Client Instructions: Fill this organizer completely before your scheduled drop-off appointment.

Returning Client Instructions: Enter your name and update only the information that changed from the previous year.

When Complete: Press 'CTRL + S' or 'Command + S' to select the save location of the completed organizer.

Part 1: Business Information				
Business Owner(s) Name				
Employer ID				
Business Name (Legal or Fictitious)				
Description of Product or Service				
Business Formation		Sole-Proprietor (Schedule C)	LLC Sole Member (Schedule C)	Partnership (Form 1065)
Business Physical Address				
City		State		Zip
Business Mailing Address (If Different)				
City		State		Zip
Business Federal Tax ID				
Business State Tax ID				

Part 2: Income & Expenses	
Income	
Gross Receipts from Sales or Services	
Returns/Allowance	
Interest Income	
1099-NEC Income (Not Incl. in Gross Receipts)	
Other Sources of Income (Rental, Refunds, Fuel Credits, etc.)	
Cost of Goods Sold	
Beginning Inventory	
Inventory Purchases for the Year	
Ending Inventory	
Items Removed/Used for Personal Purposes	
Materials and Supplies	
Expenses	
Advertising	
Telephone	
Computer and Internet	
Travel Expenses	
Commissions and Fees	
Contract Labor Expenses Paid	

Tax Year: _____

Part 2: Income & Expenses	
Wages	
Employee Benefits	
Repairs/Maintenance	
Taxes Paid	
Business Insurance	
General Liability	
Workman's Compensation	
Errors & Omissions	
Casualty Loss Insurance	
Health Insurance	
Interest Expense	
Mortgage Interest	
Business Loan	
Investment Expense and/or Interest	
Professional Expenses	
Lawyers, Accountants, & Consultants	
Tax Preparation	
Office Supplies	
Rent Expense	
Office Space	
Business Use Vehicles	
Other Rental/Lease Expenses	
Other Expenses	



Business Tax Organizer

Page 3

Tax Year: _____

Part 2: Income & Expenses

Assets Purchased

Intangible Assets/Amortization

(E.g. patents, copyrights, startup costs, etc.)

Part 3: Vehicle Information

	Vehicle 1	Vehicle 2	Vehicle 3
Date vehicle was placed in service			
Vehicle Year			
Vehicle Make			
Vehicle Model			
Total Mileage for Vehicle in the Year			
Total BUSINESS Mileage Driven			

**** Do not include commuting to primary place of business ****

Actual Expenses (If Applicable)

Name of Expense	Vehicle 1	Vehicle 2	Vehicle 3
Gas/Fuel			
Repairs/Maintenance			
Insurance			
Registration			
Parking Fees/Tolls			

Tax Year: _____

Part 3: Vehicle Information			
If You OWN the Vehicle(s):			
	Vehicle 1	Vehicle 2	Vehicle 3
Date Purchased			
Vehicle Cost			
Loan Interest Paid During Year			
If You LEASE the Vehicle(s):			
	Vehicle 1	Vehicle 2	Vehicle 3
Date Lease Began			
Length of Lease			
Fair Market Value (MSRP)			
Down Payment on Lease			
Lease Payment for the Year			
** Attach additional sheets if more than three vehicles were used during the year **			

Part 4: Home Office	
Check if you meet the primary & exclusive use test.	
Total Square Footage Used Exclusively for Business Office/Storage	
Check if you intend to use safe harbor method, rather than the actual expense method <i>(If using safe harbor method, skip the steps below.)</i>	
Check if you would like an analysis of your deduction to determine which is the larger method. <i>(Additional fee may apply)</i>	

Date Home Place in Service	
Original Cost of Home (NOT Including Land)	
Cost of Improvements	
Deductible Home Mortgage Interest (Please attach 1098)	
Real Estate Taxes Paid	
Insurance	
Rent	
Repairs & Maintenance for Entire Home	
Repairs & Maintenance for just the Business Space	
Utilities	
Repairs/Maintenance Applicable to Entire Home	
Repairs/Maintenance Applicable to Just the Business Space	

Tax Year: _____

Home Office Rules for Schedule C Business Entities (Not Allowed for S Corp or Partnership)

- Generally, there are two basic requirements for the taxpayer's home to qualify as a deduction: There generally must be exclusive use of a portion of the home for conducting business on a regular basis. For example, a taxpayer who uses an extra room to run their business can take a home office deduction only for that extra room so long as it is used both regularly and exclusively in the business.
- The home must generally be the taxpayer's principal place of business. A taxpayer can also meet this requirement if administrative or management activities are conducted at the home and there is no other location to perform these duties. Therefore, someone who conducts business outside of their home but also uses their home to conduct business may still qualify for a home office deduction.
- Expenses that relate to a separate structure not attached to the home may qualify for a home office deduction. They will qualify only if the structure is used exclusively and regularly for business.

Home Office Rules for Schedule C Business Entities (Not Allowed for S Corp or Partnership)

- \$5 per square foot for qualified business use of the home. The maximum office size for this option is 300 sq. ft. The maximum deduction under this method is \$1500.
- When using the regular method, deductions for a home office are based on the percentage of the home devoted to business use. Taxpayers who use a whole room or part of a room for conducting their business need to figure out the percentage of the home used for business activities to deduct indirect expenses. Direct expenses are deducted in full.