



Fill out one sheet for each business - do not combine businesses. Providing complete information upfront allows us to prepare your tax return faster and with greater accuracy.

Current clients can use the "Check if same as last year" box.

Business Information

Business Name		Business Activity	
Fed ID (EIN) if new to us		Business Owner	☐ Taxpayer ☐ Spouse ☐ Joint

Income ☐ *Check if similar to last year*

Gross receipts (including 1099-MISC forms for this business)	\$
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Cost of Goods Sold (if you keep inventory or build a product) ☐ *Check if similar to last year*

Purchases		Materials & Supplies	
Cost of Labor		Ending Inventory	

Expenses ☐ *Check if similar to last year.*

Advertising & Promotions		Taxes & License	
Business / Total Miles Driven	/	Travel	
Interest on Car Payments		Meals	
Parking & Tolls		Phone & Internet	
Commissions & Fees		Bank and Merchant Fees	
Sub-Contractors		Dues & Subscriptions	
Insurance (Other than Health)		Training & Continued Education	
Interest		Computers & Software	
Legal, Professional & Accounting		Home Office / Total Home (sq ft)	/
Office Expenses		Utilities	
Equipment Rent		Supplies	
Business Rent (Office Space, etc.)		Self-Employed Health Insurance Premiums	
Repairs & Maintenance		Other:	

Did you use any personal items for business purposes (such as a vehicle, phone, internet, or home tools/equipment)?

If yes, indicate the percentage used for business and record the associated costs in the "Additional Business Notes" section below.

☐ Yes ☐ No

If the business bought equipment or vehicles over \$5,000, please list separately below.

☐ Yes ☐ No

Did you pay any contractor \$600 or more who needs a 1099-NEC?

If yes, provide name, address, and EIN/SSN.

☐ Yes ☐ No

Assets Purchased in Tax Year:

Additional Business Notes:

Note: Please attach a P/L sheet or your own list of expenses, if you have them.