

Client Name _____

Business Tax Organizer

****This document provides space to report a single business.**

If you have more than one type of business activity, please duplicate this portion of the organizer for each additional business.

Name of Business: _____

Owner(s): _____

EIN: _____

Describe what your business does:

First Year in business: _____

Type of Entity:

- Schedule C
- LLC—Single Member
- LLC—Multi Member
- S-Corp
- C-Corp

Do you use QuickBooks?

- Yes—Online or Desktop? _____
If Online, make sure you have invited lea@maceykotax.com to access your file.
- No—please complete the income/expense information section**

Did you have employees last year?

- Yes—upload or drop off copies of all W-2s and W-3s
- No

Did you send 1099s to the required independent contractors (anyone paid over \$600)?

- Yes
- No, I should have sent 1099s but I didn't
- No, I was not required to send 1099s

Business Income Deductions

Gross Income	Receipts or Sales (income)		
	Returns and allowances		
Deductions			
Advertising			
Dues and Fees			
Contract Labor			
Insurance (Business/Liability)			
Insurance (Health Insurance Premiums)			
Interest (business)			
Legal and Professional Fees			
Office Expense			
Rent (Building)			
Rent (Equipment)			
Repairs/Maintenance			
Supplies (Tools etc)			
Taxes & Licenses			
Travel			
Meals			
Utilities			
Wages			
Purchases/Material			
Phone			
Other:			
Furniture & Equipment			
Date	Description	Amount	New or Used
Business Use of Home	Sq Ft of House		
	Sq Ft. of Office		
If Retail	Beginning Inventory		
	Purchases for resale		
	Ending Inventory		

Auto Expense Form

Vehicle 1

Make, Model, and Year:	
Date Received or Purchased	
Date Placed in Service	
Odometer at beginning of the year	
Odometer at the end of the year	
Business Miles During the Year	
Personal Miles During the Year	

Questions for All Taxpayers Claiming Auto Expenses:	YES	NO
Do you have evident to support your deductions?		
If yes, is your evidence written?		
Do you (or your spouse) have another vehicle available for personal use?		
Were you reimbursed for any of the above auto expenses?		

Vehicle 2

Make, Model, and Year:	
Date Received or Purchased	
Date Placed in Service	
Odometer at beginning of the year	
Odometer at the end of the year	
Business Miles During the Year	
Personal Miles During the Year	

Questions for All Taxpayers Claiming Auto Expenses:	YES	NO
Do you have evident to support your deductions?		
If yes, is your evidence written?		
Do you (or your spouse) have another vehicle available for personal use?		
Were you reimbursed for any of the above auto expenses?		

Recordkeeping: Your automobile expenses will not be allowed by the IRS without adequate records or sufficient evidence verifying business use. Daily records provide the best protection in case of an audit. We recommend that you keep a copy of your mileage log and oil change records with your tax returns for 7 years.

Sign: _____

Date: _____