

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](mailto: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

Was your home used for business purposes?

- Yes—I own my home
- Yes—I rent my home
- No

How many months was your home used for business last year? \_\_\_\_\_

What is the TOTAL square footage of your home? \_\_\_\_\_

What is the total square footage used **exclusively** for business? \_\_\_\_\_

Provide ANNUAL totals for the following:

Rent (NOT personal mortgage): \$ \_\_\_\_\_  
Gas/Electric: \$ \_\_\_\_\_  
Water/Trash \$ \_\_\_\_\_  
Homeowners Insurance: \$ \_\_\_\_\_  
Cleaning: \$ \_\_\_\_\_  
HOA Dues: \$ \_\_\_\_\_  
General Repairs: \$ \_\_\_\_\_  
Repairs/Maintenance (done only to business area): \$ \_\_\_\_\_

Did you use your vehicle for business purposes?

- Yes
- No

Provide totals for the following:

Total personal miles driven: \_\_\_\_\_  
Total business miles driven: \_\_\_\_\_  
Year/Make/Model of Vehicle: \_\_\_\_\_  
Date First Used for Business: \_\_\_\_\_

Was the vehicle available for personal use during non-business hours?

- Yes
- No

Do you have another vehicle available for personal use?

- Yes
- No

Do you have written documentation to support these expenses?

- Yes
- No

Did you receive income through a merchant account?

- Yes—upload Form 1099-K
- No

**If you provided us with your QuickBooks file, you do NOT need to fill out**

Accounting		Advertising/ Marketing		Bank Charges	
Business Gifts		Business License		Continuing Education	
Charitable Contributions		Delivery & Freight		Dues & Subscriptions	
Employee Benefits		Equipment Rental		Incentives & Awards	
Liability Insurance		Workers' Comp		Owner Health Insurance	
Parking & Tolls		Other Insurance		Interest	
Internet		Janitorial		Job Materials	
Laundry & Cleaning		Legal & Professional		Meals	
Merchant Fees		Office Expense		Outside Services	
Employee Medical Insurance		Payroll Officer GROSS Wages		Payroll Employee GROSS Wages	
Payroll Taxes Employer		Pension & Profit Sharing		Product Purchases	
Postage		Printing		Rent for Office (Not home)	
Repairs		Sales/ Presentations		Security	
Small Tools		Storage		Supplies	
Telephone		Travel (Airfare, Lodging)		Uniforms	
Utilities (not Home)		Other		Other	
Other		Other		Other	