

Today's Date *

Client Information

Tax Year *

First Name *

How did you hear about us? *

Last Name *

Phone Number *

Email *

Preferred Method of Communication *

- Phone
- Email
- Text

Company Information

Business Legal Name *

Employer Identification Number (EIN) *

If you do not have an EIN for your business, would you like for us to assist you with applying for an EIN?

- Yes
- No
- I'm not sure, I need help deciding

Street Address *

City *

State *

Zip *

Company Website *

Type of Business/Purpose of Business *

Do you materially participate in this business? *

- Yes
- No

Do you have Employees (W2s)? *

- Yes
- No

Did you pay ESTIMATED TAXES in the prior year related to this business? *

- Yes
- No

Do you have Independent Contractors (1099s)? *

- Yes
- No

Which type of entity is your company? *

- Single Member LLC
- S-Corp
- C-Corp
- Partnership
- Sole Proprietor
- I'm Unsure

Accounting Method *

- Cash Basis
- Accrual
- I'm Unsure

Business Income

To calculate your gross income (revenue before business operational expenses are deducted), we need you to provide several figures.

Total Gross Receipts *

Total Other Business Income

Do you track inventory? *

- Yes
- No

Please select which forms and/or documents you can provide to show business income earned during the tax year?*

- 1099-MISC
- 1099-K (For Credit Card Transactions)
- Bank Statements
- Third-Party Payment Processor Statements (Cash App, PayPal, Stripe)
- Profit & Loss Statement
- Self-Prepared Statement of Income Received
- Other:

Beginning Year Inventory Value

Year-End Inventory Value

TOTAL COST OF GOODS SOLD:

Business Expenses

To be deductible, a business expense must be both ordinary and necessary. An ordinary expense is one that is common and accepted in your field of business. A necessary expense is one that is helpful and appropriate for your business. An expense does not have to be indispensable to be considered necessary.

To prepare your return, we need a breakdown of your deductible business expenses subtotaled by category. ***If you need help with organizing your information or preparing an accounting, we offer those services, this is not part of tax preparation and is considered bookkeeping. If needed Bookkeeping fees will be charged at our standard hourly rate.

Advertising

Bank Fees & Service Charges

Contractors

InterestPaid

Legal & Professional Services/Fees

Office Expense

Meals

Rent or Lease of Property and/or Equipment

Repairs & Maintenance

Taxes & Licenses

Travel

Supplies

Utilities

Wages

Self-Employed Health Insurance

Business Insurance (non-health)

Other Expenses not listed above

	ExpenseName/Description	Cost
Other Expense	<input type="text"/>	<input type="text"/>
OtherExpense	<input type="text"/>	<input type="text"/>
OtherExpense	<input type="text"/>	<input type="text"/>
OtherExpense	<input type="text"/>	<input type="text"/>

Car and Truck Expenses

You may deduct car/truck expenses for local or extended business travel, including:

- between one workplace and another,
- to meet clients or customers,
- to visit suppliers or procure materials,
- to attend meetings,
- for other ordinary and necessary managerial or operational tasks or needs of your business.

Note: You cannot deduct the costs of driving your car or truck between your home and your main or regular workplace. These costs are personal commuting expenses. You should have kept a record of your business-related mileage over the year. We will use either the IRS's standard mileage rate or actual costs to calculate your deduction of business-related travel. The standard rate accounts for gas, repairs, maintenance, depreciation, and auto insurance (but not interest on a car loan). If you do not have a record of mileage or are unsure how to calculate your total, please contact our office.

Was your vehicle available for use during off-duty hours?

- Yes
- No

Do you (or your spouse) have another vehicle available for personal use?

- Yes
- No

TOTAL MILES DRIVEN FOR BUSINESS

Date vehicle put in use

Total OTHER Miles

Total COMMUTING miles

Depreciation

If you have business assets already partially depreciated, you must be able to provide a depreciation schedule from a prior tax return.

Depreciable Assets? (Check both if you have prior year depreciation and new assets to depreciate for the tax year)

- Previous Year
- New

New Assets to be Depreciated

New Asset Description	Date Placed in Service	Cost
Asset		
Asset		
Asset		
Asset		

Business Use of Home

If you use a portion of your home as your principal place of business, you may be able to deduct part of your rent or mortgage, as well as certain other relevant home expenses. In order to claim these business expenses,

the part of your home used for business generally must be used exclusively and regularly for business purposes. These purposes can include home office, production/workshop space, storage, etc. For in-home daycare providers, the usage need not be exclusive.

An expense that covers the entire home, such as rent or central heating, is considered an indirect expense. You may only deduct a percentage of these expenses equal to the percentage of the home's area that your business uses. For example, a 150 square foot office in a 1500 square foot home is 10% of the home's total area and would mean 10% of relevant home expenses could be deducted.

An expense that applies only to the business area of the home is called a direct expense. If you heat your basement work studio (and only the studio) with a pellet stove, the cost of the pellets would be fully deductible as a direct expense. If you paint your home office (but not the rest of the house), you can claim the whole expense.

I. Part of your home use for Business:

For each expense, fill in the cost and indicate whether the expense is direct or indirect. Be sure that you do not enter any expenses you might already have listed on other parts of the worksheet

Total area of home (SQUARE FEET):

Area of home used for business purposes (SQUARE FEET):

Daycare providers: Because you can deduct home business expenses even if you don't use an area exclusively, we need additional information about the operating hours of your business in order to calculate your percentage.

Days open per year

Hours per day

2. Applicable home business expenses

For each expense, fill in the cost and indicate whether the expense is direct or indirect. Be sure that you do not enter any expenses you might already have listed on other parts of the worksheet.

	Direct or Indirect	Cost
Rent (for entire home, not just business area)	<input type="text"/>	<input type="text"/>

Mortgage Interest		
Real Estate Taxes		
Homeowner's/Renter's Insurance		
Repairs, Maintenance & Improvements		
Utilities 1		
Utilities 2		
Utilities 3		
Utilities 4		
Other Expense		

In addition to tax preparation, are you interested in the following services? *

- Tax Planning & Advising
- Tax Strategies
- Accounting/Bookkeeping Packages (Weekly, Monthly, Quarterly and Semi-Annually offered)
- Year-End Tax Package
- Budgeting/Forecasting

If you selected Accounting/Bookkeeping Services - what is your desired frequency?

- Weekly
- Monthly
- Quarterly (every 3 months)
- Semi-Annually (twice per year)
- Year-End Bookkeeping Only
- Year End Tax Package

Is there anything else you would like to share with us?

A large, empty rectangular box with a thin black border, intended for the user to provide additional information or share their thoughts.