

BUSINESS ORGANIZER

Business Info

Business Name _____
 Primary Product or Service Provided _____
 Legal Entity Structure (Check One):
 Sole Prop LLC S Corp C Corp
 Month / Year Business Began _____
 Federal EIN (Tax ID Number) _____
 If more than one owner, list names, addresses, social security numbers, and ownership percentages on separate sheet

Income

| | |
|-------------------------------|--|
| Gross Receipts | |
| Less: Sales Discounts/Refunds | |
| Total Income | |

Expenses

| | |
|--|--|
| Accounting Fees | |
| Advertising and Marketing: | |
| <i>Web Hosting</i> | |
| <i>Graphic Design</i> | |
| <i>Printing</i> | |
| <i>Social Media Management</i> | |
| <i>Newspaper</i> | |
| Total Advertising and Marketing | |
| Bank Charges | |
| Commissions and Fees Paid Out | |
| Equipment, Computers, Furniture < \$500 per item | |
| Equipment > \$500 per item: list on next page | |
| Consultants / Coaching Fees | |
| Contract Labor (1099 if >\$600) | |
| Credit Card Processing Fees | |
| Dues and Memberships: | |
| Employee Benefit Plan Expense | |
| Employee Health Care Plan Expense | |
| Internet Expense (business use percentage) | |
| Licenses, Permits, Registrations | |
| Continuing Education | |
| Gift Expense (limited to \$25 per person) | |
| Insurance (exclude auto) | |
| Legal Fees (business only) | |
| Meals (if bona fide business discussion only) | |
| Office Supplies | |
| Payroll Expense: | |
| <i>Wages and Salaries (W-2s)</i> | |
| <i>Payroll Tax Expense</i> | |
| Total Payroll Expense | |
| Repairs and Maintenance | |
| Rent Expense: | |
| Office outside of Home | |
| Storage Unit | |
| Equipment Rent/Lease | |
| Total Rent Expense | |
| Subcontractor Costs | |
| Telephone (business use percentage) | |
| Travel / Conventions | |
| Other Expense: _____ | |
| Other Expense: _____ | |
| Utilities (exclude Home Office) | |
| Total Expenses | |

Auto Expense

You can claim :
 (a) Mileage rate, or (b) Actual Expenses
 Either way, we need all the following info
 for each vehicle used in business

Mileage:

| | |
|--------------------------|--|
| Total Business Miles | |
| Total Personal Miles | |
| Grand Total Miles | |

Actual Expenses:

| | |
|--------------|--|
| Gas | |
| Insurance | |
| Licenses | |
| Oil | |
| Property Tax | |
| Repairs | |
| Tires | |
| Tolls | |
| Parking | |

Vehicle Information:

| | |
|------------------------|--|
| Vehicle Year / Model | |
| Year Placed in Service | |
| Total Purchase Price | |

Inventory / Cost of Goods

| | |
|-------------------------|--|
| Beginning Inventory 1/1 | |
| Total Purchases of | |
| Resale Merchandise | |
| Ending Inventory 12/31 | |

Home Office Expense

| | |
|---|--|
| Business Use Sq Feet: | |
| Total Home Sq Feet: | |
| Provide annual cost for <u>entire</u> home: | |
| Annual Utility Costs | |
| Annual Insurance | |
| Annual Rent (if tenant) | |
| Annual Repair / Maint | |
| Annual HOA/Condo Fee | |
| Annual Home Warranty | |

Business Bank Balances

need for business entity returns Sch L

| | |
|-------------------|--|
| Beg of Year 1/1 | |
| End of Year 12/31 | |