

## 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	
<b>Total Income</b>	

### Expenses

Accounting Fees	
Advertising and Marketing:	
Web Hosting	
Graphic Design	
Printing	
Social Media Management	
Newspaper	
<b>Total Advertising and Marketing</b>	
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:	
Wages and Salaries (W-2s)	
Payroll Tax Expense	
<b>Total Payroll Expense</b>	
Repairs and Maintenance	
Rent Expense:	
Office outside of Home	
Storage Unit	
Equipment Rent/Lease	
<b>Total Rent Expense</b>	
Subcontractor Costs	
Telephone (business use percentage)	
Travel / Conventions	
Other Expense: _____	
Other Expense: _____	
Utilities (exclude Home Office)	
<b>Total Expenses</b>	

### 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:**

Business Miles Jan-June	
Business Miles Jul-Dec	
Total Non Business 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 entire 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	