

Business Tax Organizer

Terms of Use: This form is designed to assist the user in gathering the pertinent information to prepare a business entity tax return or to gather that information to give to a professional tax preparer. Though it covers the majority of tax options, the user may find some adaptation to their particular tax situation is required. In addition, while this form may help the user discover additional tax deductions that may save them money, this form in no way guarantees tax savings or reduced tax liability. By using this form the user agrees that Soulece, LLC is not responsible for the outcome of the user's tax preparation.

Section 1: Business Information

Name of Business: _____

Business Address: _____

Date Organized: _____

Description of Business Activity: _____

EIN/Tax ID Number: _____

Phone: _____ Email: _____ Website: _____

Check Your Type of Entity:

Sole Proprietorship Partnership C-Corp S-Corp LLC

* Have on Hand a Copy of the Company's Organizing Documents (This may contain information you or your tax preparer may need.)

Section 2: Owner's Information

Name	Address	%	SSN

Section 3: Income

Income from Sales	
Income from Services	
Other Income	
Cost of Goods Sold (Cost of Purchases for Resale) or Materials	
Refunds or Allowances to Customers	

If an Inventory is Involved in Your Business Provide:

Inv. at Beginning of the Year		Inv. at End of the Year	
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Section 4: Deductions

Accounting		Postage	
Advertising/Marketing		Printing	
Bank Charges		Professional Fees	
Business Insurance		Office Supplies & Expenses	
Business Phone/Cell		Outside Services	
Children Pay		Rent on Equipment	
Commissions Paid		Rent on Property/Office	
Computer, Internet, & Tech Supplies		Repairs/Maintenance	
Contract Labor Paid		Shipping	
Credit Card Processing		Supplies	
Dues/Subscriptions		Security	
Educational Expense		Seminars and Trade Shows	
Employee Benefit		Software & Online Services	
Gifts (\$25 per person)		Taxes: Payroll	
Interest (Loans/Credit Cards)		Taxes: Property	
Janitorial		Taxes: Business	
Laundry/Cleaning		Tools	
Legal Fees		Travel	
Licenses/Permits		Uniforms/Protective Clothing	
Meals		Utilities	
Meeting Expense		Vehicle Expense	
Mileage to Employees/Offices		Wages	
Payroll Expenses		Website Expense	

List any deductions you are unsure about and would like to research/ask your tax professional about.

Section 5: Home Office

Home Interest		General Repairs/Maintenance	
Home Insurance		Sq. Ft of Office Area	
Home Taxes		Sq. Ft of Home	
Utilities		Repairs & Maintenance (Office Only)	

Section 6: Equipment

Purchased Equipment		
Equipment Purchased	Cost of Equipment	Date of Purchase

Equipment Sold				
Equipment Sold	Date Sold	Amount Sold For	Date of Purchase	Original Cost of Equipment

Section 7: Concerns

List any concerns you have with your taxes to make sure you don't overlook anything.

Notes or Further Explanation: