



**2020 Tax Organizer
For Businesses & Corporations**

Phone: 850-995-5000

Fax 850-994-4522

Email: staff@durstjordan.com

Feel free to drop off your tax forms, documents and completed organizer during office hours. You do not need an appointment to drop off documents listed within this organizer.

If you would like to schedule an appointment with one of our CPAs, please call the office.

COVID-19 Updates:

If you have a concern about an in-person appointment, we have virtual appointments, phone conferences and secure email capabilities.

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Sources of Income	Check if Applicable (✓)
Copies of Bank Statements or Accounting Ledgers for Business Accounts OR: Electronic or paper copy of Quickbooks, Quicken, Money, Excel files containing 2020 income	
Forms 1099	
Any business income not included in the ledger or bank statements	
Other (Please Describe)	
Did you receive any income or incur any expense not included in this organizer? If yes, please describe:	
Deductions	
<i>Due to the Affordable Care Act, you are required to report health insurance benefits paid for more than 2% owners. Please let us know if this applies.</i>	
Bank Statements or Check Registers for business expenses	
Receipts not included in the check register (cash receipts)	
Mileage logs or fuel receipts	
Detail of assets purchased and disposed of in 2020	
Charitable contributions on behalf of business	
Payroll Registers or year-end payroll reports from processors	
Other (See Attached)	

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Expense Category	Amount
Accounting	
Advertising	
Amortization	
Automobile and Truck Expense: Fuel Insurance Oil Repairs	
Bank Charges	
Commissions	
Computer Services and Supplies	
Credit and Collection Costs	
Delivery and Freight	
Discounts	
Dues and Subscriptions	
Equipment Rent	
Gifts	
Insurance	
Janitorial	
Laundry and Cleaning	
Legal and Professional	
Meals	
Miscellaneous	
Office Expense	

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Outside Services and Independent Contractors	
Parking Fees and Tolls	
Licenses and Fees	
Postage	
Printing	
Rent	
Repair and Maintenance	
Security	
Supplies	
Taxes and Licenses	
Telephone	
Tools	
Training/Continuing Education	
Travel	
Uniforms	
Utilities	
Charitable Contributions (Please list individually with amounts):	
Other:	