



**Tax Organizer  
Commercial Fisherman**

Name \_\_\_\_\_ Corporation \_\_\_\_\_

Telephone \_\_\_\_\_ Email \_\_\_\_\_

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**Business Use of Home:**

Square Footage of Business	_____	Mortgage Interest	_____
Total Square Footage	_____	Property Tax	_____
Homeowners Insurance	_____	Repairs: Direct	_____ Indirect _____
Leasehold Improvements	_____	Utilities: Heat	_____ Electric _____
Rent	_____		

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**Gross Income**

\_\_\_\_\_

**Cost of Goods Sold**

Purchases \_\_\_\_\_  
Cost of Labor \_\_\_\_\_

**Self Employed Health Insurance**

If you purchased ObamaCare, you will need to bring form 1095A to your appointment.

\_\_\_\_\_

**Advertising**

\_\_\_\_\_

**Car & Truck**

Fuel \_\_\_\_\_  
Repairs \_\_\_\_\_

**Tolls & Ferry**

\_\_\_\_\_

**Commissions/Fees**

\_\_\_\_\_

**Insurance**

Vehicle \_\_\_\_\_  
Boat \_\_\_\_\_

**\*\*\*Interest Expense**

Boat  
Bank (Form 1098)  
Business Loans (i.e. trap loan, engine repower)  
Credit Cards  
Vehicle

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**Legal & Professional Fees**

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**Office Expense**

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**Rent**

Equipment Lease (equipment/vehicle, etc.)  
Property

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**Repairs & Maintenance**

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**Supplies**

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**Taxes & Licenses**

Fishing Licenses  
Payroll  
Property (real estate)  
Excise Tax (vehicle)  
Sales

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**Travel & Lodging**

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**Meals & Entertainment**

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**Direct Commercial Utilities**

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**Wages** (payroll, please bring payroll returns)

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**Bait**

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**Fuel**

Diesel  
Gas (off road)  
    Gallons  
    Average Price

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**Trap Stock** (rope, buoys, spindles, etc.)

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**Wharf**

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**Dock Expense**

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**Mooring Fee**

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**Uniforms/Protective Gear**

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**Foul Weather Gear**

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**Telephone**

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**Cellular Phone**

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**Internet Service**

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**Periodicals, Magazines, Publications**

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**Freight & Postage**

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**Casual Labor** (dock help, buoy painter etc.)

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**Contract Labor (sternman)**

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**Misc./Sundry**

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**Business Gifts**

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**Bank Service Charges**

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**Haul out & Launching**

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**Oil Expense**

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**Shop Expense**

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**Dues & Fees**

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**Vehicle Mileage**

Business

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Personal

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**IRA/Retirement Contributions**

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**New Equipment Purchases**

(Furnishings, electronics, traps, etc.)

**Description**

**Price**

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**Dependent Information**

<b>Name</b>	<b>Relationship</b>	<b>SS#</b>	<b>Date of Birth</b>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

**NOTE: Things you need to bring to your appointment**

- Completed Tax Organizer or Profit & Loss Statement
- Balance Sheet that lists new assets acquired for current year
- W-2 Wage & Earning Statements from employer(s)
- All 1099's that were issued to you from banks, businesses or investment groups
- If you purchased ObamaCare, you will need to bring form 1095A to your appointment
- If you have sold stocks/bonds in the past tax year, we need date purchased and what it cost you at the time of purchase
- If you are a new client, please bring your three (3) previous years taxes (Fed 1040 & State 1040-ME)

***Please call your financial lender and obtain the amount you paid for interest on all your loans (auto, business, home, etc.)***