



**Tax Organizer
Small Business**

Name _____ Corporation _____

Telephone _____ Email _____

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	_____		

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 _____

Liability _____

Workers' Compensation _____

*****Interest Expense**

Bank (Form 1098)

Business Loans (i.e. equipment)

Credit Cards

Vehicle

Legal & Professional Fees

Office Expense

Rent

Equipment Lease (equipment/vehicle, etc.)

Property

Repairs & Maintenance

Supplies

Taxes & Licenses

Payroll

Property (real estate)

Excise Tax (vehicle)

Sales

Travel & Lodging

Meals & Entertainment

Direct Commercial Utilities

Wages (payroll, please bring payroll returns)

Fuel

Diesel

Gas (off road)

Gallons

Average Price

Foul Weather Gear

Telephone (long distance)

Cellular Phone

Internet Service

Uniforms/Protective Gear

Periodicals & Magazines

Freight & Postage

Casual Labor (short term helpers)

Contract Labor (long term helpers)

Misc./Sundry

Business Gifts

Bank Service Charges

Shop Expense

Dues & Fees

Vehicle Mileage

Business

Personal

IRA/Retirement Contributions

New Equipment Purchases

(Furnishings, electronics, traps, etc.)

Description

Price

Dependent Information

Name	Relationship	SS#	Date of Birth
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

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.)