

TAX ORGANIZER FOR BUSINESSES



Please mail or fax this Tax Organizer and all supporting documents to:

**7679 Dorchester Rd
North Charleston, SC 29418
Fax: 855-524-7552**

Instructions

- All taxpayers need to complete Sections One and Section Two.
- Attach a copy of the last business tax return that was filed for this business.
- If you have a P&L statement and Balance Sheet for each year, attach to this organizer and do not complete Sections Three - Five .
- If you do not have the above financial statements, please complete ALL Sections.
- Attach asset depreciation worksheet from prior year.

Section One - General Information

Business Name: _____

Business Address: _____

Employer ID Number: _____ Nature of Business: _____

Type of Entity: _____ Corporation _____ S Corp. _____ Partnership _____ LLC _____ # members of LLC

Accounting Method: _____ Accrual _____ Cash _____ Other

Tax Year-end Date: _____ Fiscal _____ Calendar

Incorporation information:

State: _____ Date of incorporation: _____ Sub Chapter S Corp election date: _____

Shareholder/Partners - attach statement for additional shareholders/partners/ or members

Name: _____

Name: _____

Address: _____
_____Address: _____

Title: _____

Title: _____

Percent Ownership: _____

Percent Ownership: _____

I have read and agree to abide by these expectations. I also affirm that the information contained in this tax organizer, submitted to Tax Pros LLC for the purpose of preparing tax returns, is true, correct, and complete to the best of my knowledge. I further affirm that I have documentation/receipts to support this information.

Taxpayer Signature_____
Date_____
Title

Section Two – Assets

Did you purchase any new business assets during the year? ___ Yes ___ No.

If yes, please provide the following information.

Asset	Description	Date Purchased	Cost	New, Used or Trade
			\$	
			\$	
			\$	
			\$	

Section Three – Cost of Goods Sold

Complete this section if you purchase or manufacture items for resale.

Cost of Goods Sold			
	Year	Year	Year
Cost of Purchases (minus personal use)			
Cost of Labor			
Materials and Supplies			
Other Costs			

Section Four - Assets and Liabilities

	Year		Year		Year	
	Beginning	Ending	Beginning	Ending	Beginning	Ending
Assets						
Cash						
Accounts Receivable						
Less Bad Debt						
Inventory						
US Gov't. Obligations						
Tax-Exempt Securities						
Other Current Assets						
Loans to Shareholders						
Mortgage/RE loans						
Other Investments						
Other Assets						
Liabilities	Beginning	Ending	Beginning	Ending	Beginning	Ending
Accounts Payable						
Mortgages, Notes, Bonds -						
payable less than 1 yr.						
Loans from Shareholders						
payable 1 yr. or more						
Other Liabilities						

Business Income and Expenses			
	Year	Year	Year
BUSINESS INCOME RECEIVED			
Gross Receipts or Sales			
Returns and Allowances			
Gross Rent/Royalty Income			
Dividend Income (Business)			
Capital Gain Net Income			
Other Income			
BUSINESS EXPENSES			
Accounting			
Advertising			
Auto & Truck Expense			
Fuel			
Insurance			
Bad Debts			
Bank Fees			
Charitable Contributions			
Contract Labor			
Commissions and fees			
Delivery & Freight			
Employee Benefit Programs			
Insurance (other than health)			
Interest Paid(Business)			
Janitorial			
Legal & Professional Fees			
Licenses & Permits			
Meals & Entertainment			
Miscellaneous			
Office Expenses			
Pension and Profit Sharing Plans			
Rent			
Repairs and Maintenance			
Salaries: Officer(s)			
Salaries: Others			
Supplies			
Taxes not listed below			
State Income Tax Paid			
Telephone			
Travel			
Utilities			
Postage			
Payroll Expenses			
Other Expenses			