

Business Tax Data Sheet

Business Name:		Names & SSNs of Owners	Owner-ship %
Address:			
Federal ID Number:			
Type of Business:			
Products or Services:			
Business Entity:	<input type="checkbox"/> Sole Proprietor <input type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> LLC		
Date Business Formed (if new):			

Form W-3 Transmittal of Wage and Tax Statements must be included.

Business Owners: If you provide copies of your Profit and Loss Statement and/or Balance Sheets, you do not need to complete the items below.

INCOME		COST OF GOODS SOLD (If applicable)	
Gross Receipts or Sales		Inventory at Beginning of Year	
Returns & Allowances		Purchases	
Other (Indicate)		Cost of Labor (related to inventory)	
		Materials and Supplies	
		Other Inventory Costs	
Do not list 1099's or commissions separately if included in gross receipts.		Inventory Withdrawn for Personal Use	
		Inventory at End of Year	
EXPENSES			
Advertising		Office Expense	
Car and Truck Expense		Pension/Profit-Sharing (Employees)	
Commissions & Fees Paid		Rent & Lease (vehicles, equipment)	
Contract Labor		Rent & Lease (real estate)	
Employee Benefit Programs		Repairs & Maintenance	
Insurance (other than health)		Supplies (other than office)	
Mortgage Interest		Taxes and License	
Other Business Interest		Travel (100%)	
Legal and Professional Services		Meals & Entertainment (50%–2020; 100%–2021)	
		Utilities (cell, internet, etc.)	
		Wages (not reported above)	
Bad Debts (only if reported as income)		Postage / Shipping	
Bank Charges		Gifts	
Dues / Fees / License		Parking / Tolls	
Subs / Pubs		Training / Seminars	
Other (indicate)		Other (indicate)	

ASSET PURCHASES / CAPITAL IMPROVEMENTS

Description of Item	Purchase Date	Cost	Date Put Into Service

SALE OF DEPRECIABLE ASSETS

Description of Item	Date Acquired / Sold	Original Cost	Sale Amount

Did you use any part of your home for business? If yes, we will need additional specific information.

Signature: _____