

↑ Business Name (list any DBA's in Notes area on back)		Federal EIN		
Business Address		<input type="checkbox"/> this is a new address	City	State
Contact Person, Position / Title		Phone Number	E-mail	
Date of Formation	State of Formation	Year End Date if other than 12/31	Professional Licenses Held	
<input type="checkbox"/> Sole Proprietor <input type="checkbox"/> LLC <input type="checkbox"/> Partnership <input type="checkbox"/> Corporation <input type="checkbox"/> S-Corporation (provide copy of Form 2553)				
Business Entity Type				
Who is your Registered Agent:				

BUSINESS OWNERS

Name and Address (List any add'l owners on back)	Personal Phone	Social Security Number	Percentage of Ownership

TAX PREPARATION PAYMENT OPTIONS: payment is due prior to electronic filing of your approved tax returns. You will receive an invoice with a payment link for secure Credit or Debit Card payments. We also accept Zelle, Venmo, cash or check.

RETURN HANDLING OPTIONS – if your business return is NOT part of your individual tax return

- Upload to Secure Client Portal
Documents stored for 3 years

 Mail paper copy to above address
(fee for tracking)

 In-person pickup, sign & pay

Did you make any payments that would require you to file Form(s) 1099?		Yes	No
If yes, did or will you file Form(s) 1099?		Yes	No

Gross Receipts (Total Revenue NOT including sales tax)	
Inventory at begin of year	
Purchases	
Cost of labor	
Materials & Supplies	
Other Costs	
Inventory at end of year	

Home Office Deduction

Total house square footage _____

If the total dedicated business square footage is 300 sq. ft. or less, the safe harbor method can be applied. You will not need to provide expenses below.

Total dedicated business square ft _____

If the total business square footage is 300 sq. ft. or more, provide the following annual costs for the home:

Mortgage Interest	
Real Estate Taxes	
Home Owner's Insurance	
Utilities (electric, gas, water, internet)	
Repairs & maintenance	
Other Expenses	
Costs only for business (ex. Painting of business office)	

Expenses (list other expenses below or submit a Profit & Loss Statement)

Advertising		Licenses & fees		Subscriptions	
Auto & truck expenses		Office expense		Sales Tax	
--Total annual mileage		--Postage / Freight		Travel	
--Business miles		Purchased equipment	List date of purchase and cost below	Meals	
Commission & fees		Leased equipment		Utilities	
Continuing Education		Safety Equipment		--Cell Phone	
Contract labor		Tools (purch or repair)		--Internet	
Insurance (not health)		IT Services / Internet		W-2s to others	
Health Insurance		Rent		W-2s to owner	
Legal & prof services		Repairs & Maintenance		Work Clothes / Uniform cleaning	

Please tell us the nature of your business (what services do you provide or what products do you sell?)

COMMENTS / QUESTIONS / NOTES