INCITE TAX & ACCOUNTING

BUSINESS TAX ORGANIZER

Once all of your information is entered, please "Print to PDF" rather than saving the file to ensure we receive your data.

1. BUSINESS INFORMATION

* We have your info on file already. Only provide info if it has changed during the year*			
New Contact Name		New Contact Phone	
New Business Address		City, State	
		Zip	
New Contact Email			

2. OWNER'S INFORMATION

Name	Address	% Owned or Sold	SSN

3. INCOME

*If you have a profit and loss statement or some organized record of income and expenses you can provide that and skip sections 3 and 4

Total Sales	
Miscellaneous Income (i.e. Interest Income)	
Cost of Goods Sold(Cost of Purchases for Resale)	

IF AN INVENTORY IS INVOLVED IN YOUR BUSINESS PLEASE PROVIDE:

Beginning Inventory		Ending Inventory	

4. DEDUCTIONS

Accounting		Legal and Professional Services	
Advertising		Licenses and Permits	
Auto and Truck Expense		Meals and Entertainment	
Mileage		Office Expense	
Bad Debts		Parking and Tolls	
Bank Charges		Postage	
Commissions and Fees		Printing	
Delivery or Shipping		Rent	
Dues and Subscriptions		Repairs	
Employee Benefit Programs		Salaries and Wages	
Educational Expense		Supplies	
Insurance		Taxes and Licenses	
Interest		Telephone	
Laundry and Cleaning		Travel	
Outside Service/Misc.		Utilities	

***Please provide a list of all equipment purchased, date purchased, and amount paid**	☐
***Please provide a list of all equipment sold, date sold, amount of sale**	☐

5. HOME OFFICE

Sq. Ft of Office Area		Repairs/Maintenance to home	
Sq. Ft of Home		Utilities on personal residence	
Rent(if not owned)		Home Insurance	

6. CONCERNS

*Please list any concerns you have with your taxes to make sure we don't overlook anything. (i.e. You had some investments that went bad)

Income	$ 0.00
COGS	$ 0.00
Gross Profit	$ 0.00
Expenses	$ 0.00
Net Income	$ 0.00