

To set an appointment please email: CPA@UnderstandYourTaxes.com

Business Tax Return Information

Name of Business _____ Tax-ID _____
Address _____ City _____ Zip code _____
Phone: _____ Email: _____

List of expenses needed to be sent to the CPA:

For your business I need a **total dollar amount** (Do not send receipts or individual expenses, just total cost) for each category below:

- Total Income \$ _____
- Advertising \$ _____
- Contract labor \$ _____
- Commissions/fees \$ _____
- Legal and Accounting \$ _____
- Business insurance \$ _____
- Office expenses (includes postage and all other miscellaneous expenses) \$ _____
- Rent \$ _____
- Repairs/maintenance \$ _____
- Supplies \$ _____
- Travel \$ _____
- Meals \$ _____
- Utilities \$ _____

Assets: List every item you bought that was over \$100.

<i>Asset Description</i>	<i>Date Purchased</i>	<i>Cost</i>
_____	_____	_____
_____	_____	_____
_____	_____	_____

Automobile:

Year and model of car: _____

Total business miles for the year: _____

Special notes/questions for this year:

