

Have questions? Please email: [CPA@UnderstandYourTaxes.com](mailto: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** for each category below  
(Do not send receipts or individual expenses, only the total cost):

- Total Income \$ \_\_\_\_\_
- Advertising \$ \_\_\_\_\_
- Commissions/fees \$ \_\_\_\_\_
- Contract labor \$ \_\_\_\_\_
- Legal and Accounting \$ \_\_\_\_\_
- Business insurance \$ \_\_\_\_\_
- Office expenses (includes postage & other misc expenses) \$ \_\_\_\_\_
- Rent \$ \_\_\_\_\_
- Repairs/maintenance \$ \_\_\_\_\_
- Supplies \$ \_\_\_\_\_
- Travel \$ \_\_\_\_\_
- Meals \$ \_\_\_\_\_
- Utilities \$ \_\_\_\_\_
- IF you have a home office, what is square footage? \_\_\_\_\_

**Assets:** List all items costing over \$200 (Do Not include in totals above).

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

### **Automobile:**

Year/model of car: \_\_\_\_\_ Total business miles for the year:  
\_\_\_\_\_

### **Special notes/questions for this year:**

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**NOTE for all Business Owners:** Please note that there may be a reporting requirement for your business based on a recent FinCEN law. Find relevant data at the following link:

<https://www.fincen.gov/boi>.

*As outlined in our engagement letter, due to legal reasons, CPA firms do not assist in preparing this report or answering questions related to it.*