

# 2023 Business Tax Organizer

Name of Business: \_\_\_\_\_ Tax ID Number/EIN (if applicable): \_\_\_\_\_

Business Address (Include City, St, Zip): \_\_\_\_\_

Principal Activity/Product/Service: \_\_\_\_\_

Type of Entity: S-Corp (1120S)  Partnership (1065)  Non-Profit (990)  C-Corp

Accounting Method: Cash  Accrual  Other  Other Description: \_\_\_\_\_

Calendar Year  or Fiscal Year  ( \_\_\_\_\_ to \_\_\_\_\_ )

YES NO

Did you make payments of \$600+ to subcontractors, attorneys, accountants, directors, etc.?

If yes, did you issue Form 1099-NEC? (provide copies)

Did you have any employees? (provide copies of W2s)

Has the business reported any losses in prior years?

Did you pay for your health/dental insurance? (if yes, provide premium amount paid during the year)

Did you, or will you, make any contributions to a self-employed retirement plan?

## List of Shareholders/Officers

Shareholder Name: \_\_\_\_\_ SSN: \_\_\_\_\_ Title: \_\_\_\_\_ Share %: \_\_\_\_\_

Shareholder Address (Include City, St, Zip): \_\_\_\_\_

Shareholder Name: \_\_\_\_\_ SSN: \_\_\_\_\_ Title: \_\_\_\_\_ Share %: \_\_\_\_\_

Shareholder Address (Include City, St, Zip): \_\_\_\_\_

Shareholder Name: \_\_\_\_\_ SSN: \_\_\_\_\_ Title: \_\_\_\_\_ Share %: \_\_\_\_\_

Shareholder Address (Include City, St, Zip): \_\_\_\_\_

Shareholder Name: \_\_\_\_\_ SSN: \_\_\_\_\_ Title: \_\_\_\_\_ Share %: \_\_\_\_\_

Shareholder Address (Include City, St, Zip): \_\_\_\_\_

Please check here if you subscribe to our QuickBooks Services!

*\*If you do not subscribe to our QuickBooks Services, please provide your own Profit & Loss documentation\**

Please list any asset purchases for depreciation:

Description: \_\_\_\_\_ Date Acquired: \_\_\_\_\_ Cost: \_\_\_\_\_ Business Use (%): \_\_\_\_\_

Description: \_\_\_\_\_ Date Acquired: \_\_\_\_\_ Cost: \_\_\_\_\_ Business Use (%): \_\_\_\_\_

Description: \_\_\_\_\_ Date Acquired: \_\_\_\_\_ Cost: \_\_\_\_\_ Business Use (%): \_\_\_\_\_

Description: \_\_\_\_\_ Date Acquired: \_\_\_\_\_ Cost: \_\_\_\_\_ Business Use (%): \_\_\_\_\_

NOTES: \_\_\_\_\_

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