



## BUSINESS ORGANIZER

GENERAL INFORMATION		
Company		EIN
Principal Business or profession		
Business Address	City	Zip
Business Email	Business Phone Number	

Entity Type <i>(Circle one)</i>	Sole Proprietor	S Corp	Partnership
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Was there an ownership change?	Yes / No
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OWNER INFORMATION		
Shareholder/Partner Name	SSN	Percent Owned
Address	City	Zip
Email	Phone Number	

Shareholder/Partner Name	SSN	Percent Owned
Address	City	Zip
Email	Phone Number	

Shareholder/Partner Name	SSN	Percent Owned
Address	City	Zip
Email	Phone Number	

BUSINESS INCOME		
	Amount	Notes
Reported on Form(s) 1099		
Other Income		
Other Income		

BUSINESS EXPENSES			
	Amount		Amount
Compensation of Officers (W-2)		De Minimis Supplies/Repairs	
Employee Salaries and Wages (W-2)		Equipment Rent	
Repairs and Maintenance		Insurance	
Bad Debts		Officer Health Insurance	
Rent		Employee Health Insurance	
State Franchise or Income Taxes/Fees		Liability	
Payroll Taxes		Internet/ Website	
SS		Janitorial	
MED		Laundry and Cleaning	
FUTA		Legal and Professional	
SUI		Meals	
Other Taxes		Entertainment	
Licenses		Office Expense	
Interest		Outside Sevices/Contractors	
Advertising		1099s issued?	Y / N
SEP/401(k)/Solo 401(k)/SIMPLE Cont		Payroll Processing Fees	
Accounting		Parking Fees and Tolls	
Automobile/Truck Expense		Permits and Fees	
Bank Charges		Postage	
Charitable Contributions		Printing	
Cleaning		Security	
Client Gifts (\$25 max per client)		Supplies	
Commissions		Telephone	
Computer Services and Supplies		Tools	
Credit and Collection Costs		Training/Continuing Education	
Delivery and Freight		Travel	
Discounts		Uniforms	
Dues and Subscriptions		Utilities	
De Minimis Supplies/Repairs		Other:	
Equipment Rent		Other:	

ACCOUNT BALANCES			
Include Bank Accounts (traditional, Paypal, Venmo, Cashapp, etc.), Virtual Currency, Credit Cards, Loans, etc.			
<i>Account</i>	<i>Ending Balance</i>	<i>Account</i>	<i>Ending Balance</i>

COST OF GOODS SOLD		
	<i>Amount</i>	<i>Notes</i>
Inventory at Beginning of Year		
Purchases		
Cost of Labor		
Inventory at End of Year		

BUSINESS MILEAGE			
<i>Vehicle</i>	<i>Date in Service</i>	<i>Total Mileage</i>	<i>Business</i>

ASSET PURCHASES			
<i>Asset</i>	<i>Date Purchased</i>	<i>Amount</i>	<i>Condition</i>

ASSET DISPOSALS			
<i>Asset</i>	<i>Date Sold</i>	<i>Amount</i>	<i>Exchange/Trade?</i>

HOME OFFICE (EXCLUSIVE USE ONLY)			
Home Square Footage		Office/Storage Square Footage	

## **Business Tax Drop-Off Checklist**

☐ **Tax Engagement Agreement:** Please sign the agreement, which contains the **price quote estimate**.

☐ **Address, Email(s), and Phone Number(s):** Has any of your contact info changed? Y / N  
If so, please provide updated info below.

**Virtual Currency:** At any time during 2025, did your company sell, send, exchange, or otherwise acquire any financial interest in any? (Bitcoin, Ethereum, Dogecoin, etc.) Y / N

**Foreign Owners:** Are any owners of the business non-US Citizens? Y / N  
Who? \_\_\_\_\_ Resident Country? \_\_\_\_\_

**Foreign Income:** Does the business have any foreign income? Y / N

**Ownership:** Was there a change in ownership during 2025? Y / N

**States:** Do you do business in multiple states? Y / N

**Return Copy:** Do you want to receive a hard copy of your tax return, or digital only? Y / N

**Business Info:** If you do not have financial statements, complete the Business Organizer.

**2024 Tax Return:** If DPFT did not prepare your 2024 business return, please provide a copy.

**Retirement Plan:** Is there a company retirement plan? Y / N  
If so, what type? ☐ 401(K) ☐ SEP ☐ Simple

**Quickbooks:** Do you use Quickbooks? Y / N

If so, **Desktop** or **Online**? (Circle one). Please provide the login information:

Username: \_\_\_\_\_ Password: \_\_\_\_\_ Desktop Year: \_\_\_\_\_

**Personal Return Pick-Up:** If BA Tax Pros repares your 1040, do you want to pick up all returns at the same time? Y / N

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

### **FOR OFFICE USE ONLY: Tax Pick-Up Checklist**

☐ Signed Engagement Letter

☐ Signed EF Forms

☐ Payment