



**BUSINESS ORGANIZER**

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

<b>Entity Type</b> <i>(Circle one)</i>	<b>Sole Proprietor</b>	<b>S Corp</b>	<b>Partnership</b>
--	------------------------	---------------	--------------------

<b>Was there an ownership change?</b>	<b>Yes / No</b>
---------------------------------------	-----------------

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	

<b>BUSINESS INCOME</b>		
	<i>Amount</i>	<i>Notes</i>
Reported on Form(s) 1099		
Other Income		
Other Income		

<b>BUSINESS EXPENSES</b>			
	<i>Amount</i>		<i>Amount</i>
Compensation of Officers (W-2)		De Minimis Supplies/Repairs	
Employee Salaries and Wages (W-2)		Equipment Rent	
Repairs and Maintenance		<i>Insurance</i>	
Bad Debts		Officer Health Insurance	
Rent		Employee Health Insurance	
State Franchise or Income Taxes/Fees		Liability	
<i>Payroll Taxes</i>		Internet/ Website	
SS		Janitorial	
MED		Laundry and Cleaning	
FUTA		Legal and Professional	
SUI		Meals	
Other Taxes		Entertainment	
Licenses		Office Expense	
Interest		<i>Outside Sevices/Contractors</i>	
Advertising		1099s issued?	<b>Y / N</b>
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:	

<b>ACCOUNT BALANCES</b>			
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>

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

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

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

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

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