



Tax Record Checklist For Business

This tax record checklist for business is created for you to gather tax records and receipts for the tax season. Please provide us this checklist with the following information for tax preparation:

- _____ **Last Years Tax Return**
- _____ **Taxpayers Name and Business Name**
- _____ **Taxpayers Business Starting Date**
- _____ **Taxpayers Social Security Number Or Tax Identification Number**
- _____ **Business Address (If Different Then Last Years Return)**
- _____ **Type Of Business (Examples Doctor, Graphic Artist, Lawyer)**

INCOME:

- _____ 1099 Miscellaneous
- _____ Total All Income Invoice/Receipts
- _____ Returned Products

EXPENSES:

- _____ Employees (including spouse and children)
- _____ Advertising (business cards, newspaper ads, flyers)
- _____ Car mileage expenses (cost of the car and what year started using it for your business)
- _____ Computer cost (monitor, cpu, keyboard, and printer)
- _____ Other equipment (cabinets, desk, chair, calculator)
- _____ Legal fees for attorney or tax preparer
- _____ Fees for consultant/contract support
- _____ Insurance on computer or other equipment
- _____ Office rent
- _____ Leasing cost for equipment
- _____ Home office
- _____ Maintenance/Repair cost for equipment, machinery or vehicles
- _____ Travel
- _____ Meals and entertainment
- _____ Business gifts
- _____ Utilities (business phone line, long distance calls for regular phone line, and pager)
- _____ Internet service fees
- _____ Supplies (paper, ink, computer disk, folders, note pads, envelopes, and labels)
- _____ Federal and state taxes paid for business
- _____ Business loan interest or mortgage interest (if you have a home office)
- _____ Licenses (for business certification)
- _____ Other expenses (training, stamps, business books, examination fees, business tapes, and computer software for your business)