SIMPLE ACCOUTNING BUSINESS TAX PREPARATION INTAKE FORM

Business Name					EIN			
Address								
City		State		Zip				
Contact Person				Prefer	ed Method of Contact			
Business Phone		Cell Phone		Email				
Best Time to Reach:		# of years in business		Number of Employees				
What is the nature of the business?								
Date Business Started (If started this year)								
Sole Proprietorship	Corporation		S-Corp	S-Corp				
Partnership	Non Profit		LLP		Individual			
Name(s) of Owners, part	tners:							
Name:	•		Title:		%ownership?:			
Address:	City		State	Zip				
Phone: Email:								
Name:	Title:			%ownership?:				
Address:	City		у	State	Zip			
Phone:	Email:							

Please provide us with an Accountant copy of your QuickBooks, or if you need us to figure your income and expenses we will need access to your bank statements preferably access to your bank account so that we can do the bookkeeping for them. If you do not have a QuickBooks use the below worksheet.

Part 1 - Income (Attach any 1099 Form	ns Received)				
Income		Part 4 - Vehicle Information			
		Vehicle Year & Model			
		Total Mileage			
Part 2 – Inventory (at your cost)		Business Mileage			
Inventory Value on 1/1					
(should match last year's ending inve	ntory)	Actual Expenses			
Total Purchases During the Year		Gas			
Purchase Returns & Allowances		Repairs			
Cost of Items used Personally		Insurance			
Value of Inventory on 12/31		Interest on Loan			
Part 3 – Expenses		Purchase Year			
Advertising		Purchase Price			
Bad Depts (only if sale is included in i	ncome)	Other Auto Expenses			
Bank Charges	,	•			
Classes, Training		Part 5 – Business Use of Home	!		
Client Gifts		Sq Footage of Home			
Commissions Paid Out		Sq Footage of Exclusive Space	e		
Interest on Business Loans					
Office Expense		Mortgage Interest			
Meals		Property Taxes			
Membership Fees		Power			
Rent		Gas			
Payroll		Water			
Telephone		Garbage			
Business Travel		Repairs & Maintenance			
Other Expenses		Homeowner's Insurance			
		Other			
Part 6 – Business Assets Purchased Du Item		over \$2500) Cost			
To the best of my knowledge the infor income, deductions, and other informations.		_			
for which I have adequate records. Taxpayer Signature	Date	Spouse Signature	 Date		