



## *Small Business Tax Checklist (Schedule C)*

### *Business Information*

- Company Name
- Current address & phone number
- EIN/Date Started
- Type of business (LLC or Sole Proprietor)
- Industry

### *Income Information*

- Gross Receipts or Sales
- 1099-INT – Interest Income
- Inventory (Beg, End & Purchases) if Applicable
- Returns & Allowances

### *Expenses*

- Advertising
- Automobile Expense (Mileage & actual expenses)
- Payments to Contractors (1099s issued)
- Bank Fees
- Legal & Professional Fees
- Insurance Expense (Non medical)
- Supplies
- Office Expenses
- Rent (Equipment & Office Space)
- Interest Expense
- Travel Expenses
- Meals & Entertainment
- Charity
- Utilities
- Cell Phone
- Cable/Internet
- Taxes & Licenses
- Wages Paid
- Equipment
- Hardware/Software
- Journals & Magazines
- Professional Organizations
- Repairs & Maintenance
- Other Expenses



## *Rental Property Checklist (Schedule E)*

### *Rental Property Information*

- Address
- Purchase Date
- Cost of Property

### *Income Information*

- Rental Income
- 1099-Misc – Miscellaneous Income (Rental Income)

### *Expenses*

- Advertising
- Automobile Expense (Mileage & actual expenses)
- Mortgage Interest
- Bank Fees
- Real Estate Taxes
- Insurance Expense
- Supplies
- Office Expenses
- Repairs & Maintenance
- Association Fees
- Cleaning & Supplies
- Legal & Professional Fees
- Management Fees
- Utilities
- Cell Phone
- Occupancy License & Fees
- Other Expenses