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Small Business Tax Organizer

Company Information:

| | | | |
|-------------------|-------------|---|------|
| Owner Name: | | Social Security No.: ____ - ____ - ____ | |
| Business Name: | | EIN/FIN: ____ - ____ | |
| Business Address: | City: | State: | Zip: |
| Contact Name: | | Email: | |
| Work Phone: | Home Phone: | Cell Phone: | |
| Contact Address: | City: | State: | Zip: |

Business Income and Expenses:

You do NOT need to complete this form if you are using Quickbooks or an accounting program and provide us with a P&L and Balance Sheet for the end of the year.

| | |
|----------------|--|
| Income: | |
| \$ | Total Income Reported NOT 1099-Misc.'s or 1099-K's |
| \$ | Total Income Reported on 1099-Misc.'s |
| \$ | Total Income Reported on 1099-K's |
| \$ | TOTAL INCOME FROM BUSINESS |

| | |
|----------------------------|---|
| Cost of Goods Sold: | |
| \$ | Total dollar amount of all inventory at the beginning of the year |
| \$ | Total dollar amount of all purchases for the year |
| \$ | Total dollar amount of all inventory at the end of the year |
| \$ | Total Sub-Contractors Expense* |

Total Payments to Sub-Contractor Exceeding \$600 for the Year Require Form 1099-Misc be Filed with IRS

| | |
|------------------|--|
| Expenses: | |
| \$ | Advertising (brochures, ads, business cards, flyers, signs) |
| \$ | Vehicle Expense (mileage or actual expense) |
| \$ | Wages (paid to employees via W-2) |
| \$ | Wages (paid to non-employees 1099-Misc) |
| \$ | Insurance (business insurance, liability, worker's comp., bonds, etc.) |
| \$ | Interest Paid |
| \$ | Legal/Professional Fees (lawyer, tax preparer, consultants) |
| \$ | Office Supplies (pens, paper, staples, etc.) |
| \$ | Rent or Lease (office rent, storage rent) |
| \$ | Equipment/Machinery Rental (for business use) |
| \$ | Equipment/Machinery Purchase (for business use) |
| \$ | Tools (small tools needed to run the business) |
| \$ | Repairs / Maintenance (computers, or equipment for office) |
| \$ | License (fees paid - business related) |

| | |
|----|---|
| \$ | Travel Expenses (car rental, air travel, tolls, parking fees) |
| \$ | Meals (meals related to business meetings) |
| \$ | Entertainment (business related meetings) |
| \$ | Utilities (gas, electricity, business related) |
| \$ | Phones (landline, fax line, or cell related to business) |
| \$ | Internet (fees paid for computer connections, websites) |
| \$ | Gifts to Clients/Customers |
| \$ | Postage and Shipping |
| \$ | Bank Fees and Charges |
| \$ | Employment Taxes for W-2 Employees |
| \$ | Unsecured Property Taxes |
| \$ | Other: |
| \$ | Other: |
| \$ | Other: |

Major Purchases Over \$1000:

| | | |
|----|-------|----------------|
| \$ | Item: | Purchase Date: |
| \$ | Item: | Purchase Date: |
| \$ | Item: | Purchase Date: |

| Total Business Miles: | Vehicle #1 | | Vehicle #2 | |
|---|------------|----|------------|----|
| Date Vehicle Placed in Service | | | | |
| Vehicle Year, Make and Model | | | | |
| Odometer Reading on January 1 st | | | | |
| Odometer Reading on December 31 st | | | | |
| TOTAL mileage driven during the year | | | | |
| Business Mileage driven during the year | | | | |
| Business parking fees & tolls | \$ | | \$ | |
| Was another vehicle available for personal use? | Yes | No | Yes | No |
| Do you have evidence to support your deduction? | Yes | No | Yes | No |
| Is the evidence you have written evidence? | Yes | No | Yes | No |

Business Use of Home:

| | |
|----|---|
| \$ | Square Footage Used Exclusively for Business Office/Storage |
| \$ | Square Footage of Home |
| \$ | Original Cost of Home + Cost of Subsequent Improvements |
| \$ | Deductible Home Mortgage Interest Form 1098 |
| \$ | Real Estate Taxes Paid |
| \$ | Insurance |
| \$ | Rent |
| \$ | Repairs and Maintenance |
| \$ | Utilities |
| \$ | Other Expenses (Security, HOA, Pest Control, etc.) |
| \$ | Other: |
| \$ | Other: |