

# Business Tax Organizer

Use a separate organizer for each business

## General Information

|   |  |                                 |               |
|---|--|---------------------------------|---------------|
| Legal name of Business  |  | EIN                             |               |
| Business Address  |  |                                 |               |
| Individual Responsible for Signing return/ Correspondence   |  | Title                           |               |
|   |  | Email                           | Phone (    )  |
| Check one: <input type="checkbox"/> General Partnership <input type="checkbox"/> Limited Partnership <input type="checkbox"/> Limited Liability Partnership (LLP) |  | S-Corp                          | LLC    C-Corp |
| Principal business activity   |  | Date business started    /    / |               |
| Principal product or service  |  | Date business closed    /    /  |               |
| <input type="checkbox"/> Yes <input type="checkbox"/> No  | Was the primary purpose of the business activity to realize a profit?              |                                 |               |
| <input type="checkbox"/> Yes <input type="checkbox"/> No  | Does the partnership file under a calendar year? (If no, what is the fiscal year?) |                                 |               |

## Principal Partners / Ownership Information

| Name | Tax ID number<br>(SSN or EIN) | Address | Ownership<br>percentage | General or<br>limited partner* | U.S.<br>citizen? |
|------|-------------------------------|---------|-------------------------|--------------------------------|------------------|
|      |                               |         |                         |                                |                  |
|      |                               |         |                         |                                |                  |
|      |                               |         |                         |                                |                  |
|      |                               |         |                         |                                |                  |
|      |                               |         |                         |                                |                  |

\***General partner.** A general partner is a partner who is personally liable for partnership debts.

**Limited partner.** A limited partner's personal liability for partnership debts is limited to the amount of money or other property contributed or required to contribute to the partnership.

## Partners/ Owners Other Transactions

| Partner name | Guaranteed<br>payments | Health insurance<br>premiums paid | Capital contributions<br>from partner | Distributions<br>to partner | Partner loans to<br>the Business | Loans repaid by<br>business to partner |
|--------------|------------------------|-----------------------------------|---------------------------------------|-----------------------------|----------------------------------|--|
|              |                        |                                   |                                       |                             |                                  |  |
|              |                        |                                   |                                       |                             |                                  |  |
|              |                        |                                   |                                       |                             |                                  |  |
|              |                        |                                   |                                       |                             |                                  |  |

## All Clients – Additional information and documents required

Provide the income/financial statements for the year (per books), balance sheet, depreciation schedule per books, and cash reconciliation of business bank accounts with ending cash balance.

- If the business has employees or paid independent contractors, provide a copy of all Forms W-2, W-3, 940, 941, 1096, 1099-NEC, 1099-MISC, and any other forms issued to workers.
- If any partners live in a different state or outside the U.S., provide details. The business may be subject to withholding requirements.

## New Clients – Additional information and documents required\*

Date business formed  
State business formed in

- Provide copies of the business agreement and any other supporting organizational documents.
- Provide copies of depreciation schedules for book, tax, and AMT.
- Provide copies of tax returns for last two years, including state returns (if applicable).

## Asset Purchases – Enter the following information for depreciable assets purchased that have a useful life greater than one year

| Asset | Date purchased | Cost | Date placed in service | New or used? |
|-------|----------------|------|------------------------|--------------|
|       |                | \$   |                        |              |
|       |                | \$   |                        |              |
|       |                | \$   |                        |              |
|       |                | \$   |                        |              |
|       |                | \$   |                        |              |
|       |                | \$   |                        |              |

## Assets Sold or Disposed of During Year

| Asset | Date out of service | Date sold | Selling price/FMV | Trade-in? |
|-------|---------------------|-----------|-------------------|-----------|
|       |                     |           | \$                |           |
|       |                     |           | \$                |           |
|       |                     |           | \$                |           |
|       |                     |           | \$                |           |
|       |                     |           | \$                |           |
|       |                     |           | \$                |           |

## Quickbooks information (if file sent or included)

Quickbooks Year / Version

Username

Password

## Tax Return Preparation

We will prepare the business tax return based on information provided. In the event the return is audited, you will be responsible for verifying the items reported. It is important that you review the return carefully before signing to make sure the information is correct. Unless otherwise stated, the services for preparation of the partnership's return do not include auditing, review, or any other verification or assurance.

## Taxpayer Responsibilities

- You agree to provide us all income and deductible expense information. If additional information is received after we begin working on the return, you will contact us immediately to ensure the completed tax returns contain all relevant information.
- You affirm that all expenses or other deduction amounts are accurate and that you have all required supporting written records. In some cases, we will ask to review documentation.
- You must be able to provide written records of all items included on the return if audited by either the IRS or state tax authority. We can provide guidance concerning what evidence is acceptable.
- You must review the return carefully before signing to make sure the information is correct.
- Fees must be paid before the tax return is delivered to you or filed for you. If you terminate this engagement before completion, you agree to pay a fee for work completed. A retainer is required for preparation of late returns.
- You should keep a copy of the tax return and any related tax documents. You may be assessed a fee if you request a copy in the future.

Signatures. By signing below, you acknowledge that you have read, understand, and accept your obligations and responsibilities.

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*Taxpayer*

*Title*

*Date*

## Privacy Policy

The nature of our work requires us to collect certain nonpublic information. We collect financial and personal information from applications, worksheets, reporting statements, and other forms, as well as interviews and conversations with our clients and affiliates. We may also review banking and credit card information about our clients in the performance of receipt of payment. Under our policy, all information we obtain about you will be provided by you or obtained with your permission.

Our firm has procedures and policies in place to protect your confidential information. We restrict access to your confidential information to those within our firm who need to know in order to provide you with services. We will not disclose your personal information to a third party without your permission, except where required by law. We maintain physical, electronic, and procedural safeguards in compliance with federal regulations that protect your personal information from unauthorized access.

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