

# Small Business Tax Organizer 2024 Tax Year



## BASIC INFORMATION:

Business Name \_\_\_\_\_

EIN (if new) \_\_\_\_\_

Physical Address \_\_\_\_\_

Mailing Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Email \_\_\_\_\_ Phone \_\_\_\_\_

Yes No

Did the business receive or sell/exchange/dispose of any digital assets in 2024 (i.e. Bitcoin)?

Did you receive 1099MISC/NEC/K forms? Please attach copies.

Did you issue 1099s?

Does your business pay wages? (If yes, attach W2s and W3)

Did you purchase any large assets (over \$2500)  
if yes provide a list with dates and amounts.

Do you have inventory (items for sale)?  
Cost of Items purchased this year \_\_\_\_\_  
Inventory Cost value on hand at year end \_\_\_\_\_

Do you have a business retirement plan (SEP, SIMPLE, 401k)?  
 If YES, do you want help calculating the amount you can contribute?

Do you have any business loans outstanding?  
Please provide the ending balance as of 12/31 outstanding on each loan

Are you filing as an s corporation or partnership? If yes please provide:  
Bank Balances as of 12/31 (provide statement) \_\_\_\_\_  
Credit Card balances as of 12/31 (provide statement) \_\_\_\_\_

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## BUSINESS VEHICLE USE: Vehicle 1

## Vehicle 2

Make/Model of Vehicle \_\_\_\_\_

Date Placed into service \_\_\_\_\_

ALL miles driven on the vehicle during the year \_\_\_\_\_

BUSINESS only miles \_\_\_\_\_

\*ONLY if you use the Actual method, include the cost of all vehicle expense for the year (fuel, repair, registration, interest, etc.) \* \_\_\_\_\_

Yes No

Do you maintain written mileage records? (Cannot deduct if you mark 'NO')

## HOME OFFICE:

A home office is a dedicated space in the home used only for purposes of this business.

Square Footage of the entire Home \_\_\_\_\_

Square Footage of the OFFICE space \_\_\_\_\_

If this office space is new since the prior year, please include the purchase price of the home plus prior year improvements \_\_\_\_\_.

ANNUAL COSTS: (Include totals, I will calculate the home office % for you)

Mortgage Interest (Provide 1098INT) \_\_\_\_\_

Real Estate Taxes \_\_\_\_\_

Homeowners/Renters Insurance \_\_\_\_\_

Rent paid \_\_\_\_\_

Home Repairs & Maintenance \_\_\_\_\_

Office specific repairs \_\_\_\_\_

Major Home Improvements (over \$2500) \_\_\_\_\_

Utilities (gas, electric, water, etc) \_\_\_\_\_

HOA Dues \_\_\_\_\_

Other \_\_\_\_\_

Yes No

(S corp only) Did you reimburse yourself for this deduction in 2024, if yes how much \_\_\_\_\_?

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If you have a **QuickBooks** file, you may upload a portable copy (for desktop) or let me know when the file is ready (for QuickBooks online) instead of filling out this page. Include Username and Password with the portable file.

## **INCOME:**

Yearly Total

Gross Sales or other Income Received

\_\_\_\_\_

## **EXPENSES: IRS Suggested Expense Categories**

Advertising

\_\_\_\_\_

Commissions paid to others

\_\_\_\_\_

Contract Labor

\_\_\_\_\_

Insurance (except for health)

\_\_\_\_\_

Health Premiums (not paid by another employer)

\_\_\_\_\_

Interest Expense (on business loans/credit cards)

\_\_\_\_\_

Legal & Professional Services

\_\_\_\_\_

Office Expense

\_\_\_\_\_

Rent – machinery and equipment

\_\_\_\_\_

Rent – office space

\_\_\_\_\_

Repairs & Maintenance (not Auto)

\_\_\_\_\_

Supplies and Job Materials

\_\_\_\_\_

Sales Tax remitted to gov. agencies

\_\_\_\_\_

Taxes & Licenses (not income tax)

\_\_\_\_\_

Meals (Food and Drink)

\_\_\_\_\_

Travel (hotels, flights, rental cars, taxis)

\_\_\_\_\_

Utilities (Business only, not home office)

\_\_\_\_\_

## **Other Commonly Used Expense Categories**

Bank Charges

\_\_\_\_\_

Dues, Subscriptions

\_\_\_\_\_

Continuing Education

\_\_\_\_\_

Gifts (up to \$25 per person)

\_\_\_\_\_

Internet

\_\_\_\_\_

Telephone

\_\_\_\_\_

Laundry & Cleaning

\_\_\_\_\_

Parking & Tolls

\_\_\_\_\_

Postage

\_\_\_\_\_

Uniforms and Protective Equipment

\_\_\_\_\_

Other \_\_\_\_\_

\_\_\_\_\_

Other \_\_\_\_\_

\_\_\_\_\_