Business Information Form

General Business Info :	**Business Name** ______ **Today's Date** ______ **Address** ______ [Street] [PO Box] **City Limits** ☐ Yes ☐ No ______ [City] [State] [ZIP] **County** ______ **Phone #** ______ **Fax #** ______ **Email** ______ **Start Date** ______ **Payroll Start Date** ______
Nature of Business :	
Business Status	☐ **Corporation** → ◇C -or- ◇S Fiscal Year End Date ______ ☐ LLC → Filing as ◇ Sch C (single member) ◇S Corp ◇Partnership ☐ **Partnership** ☐ **Sole Proprietor** Date of Incorporation ______ State of Incorporation ______
ID #'s :	**FEIN** ______ **Charter #** ______ **Franchise ID** ______ **Sales Tax** ☐ Yes ☐ No # ______ **Due** ☐ Monthly ☐ Semi-Annually
Method of Accounting	☐ **Software** → ◇QuickBooks (Version ______ Password ______) ◇Other ______ ☐ **Manual**
Officers/ Partners :	**Name** / **Address** / **Phone #** / **SSN**
Special Issues or Concerns :	

FOR OFFICE USE ONLY

Setup Checklist:
☐ Organizer ☐ Pfx
☐ QB / BQ ☐ Payroll
☐ VPM ☐ Write-Up
Client # ______

For Office Use Only:

Business Services :	☐ **Tax Service**	☐ **Payroll**	☐ **Accounting**	☐ **Other**
	☐ ______	☐ Reporting	☐ Write-Up M / Q	☐ Sales Tax / Use Tax Q / S
	______	☐ Full Service	☐ QB Review M / Q / A	☐ Ohio CAT Q / A
	______	☐ ______	☐ Compiled FS M / Q / A	☐ 1099s
			☐ ______	☐ ______

2012 Small Business Owners
Additional Information Needed

____
Taxpayer(s) Name

The intent of this checklist is to assist you in gathering your necessary tax data needed to complete your tax return(s). The list is not intended to be exhaustive. If you have specific questions regarding business income, expenses or deductions, please call our office to schedule an appointment.

- **New to .**
  - ☐ Provide copies of your Federal, State and Local tax returns filed for the last 3 years
- **Submit business records of income and expenses, asset purchases, etc.** Check applicable form of submission.
  - ☐ Quickbooks Accountant's Copy (
    - Provide QB Version, File Name, User Name, and Password
  - ☐ Spreadsheet
  - ☐ Other ______________________________
- **Copies of all tax statements received for your business and/or submitted by your business.** Check all that apply.
  - ☐ 1099-Misc (Note: be sure to include all your income even if you did not receive a 1099)
  - ☐ 1099-K
  - ☐ 1099-Int
  - ☐ Statements of loan balances and interest paid at year end
  - ☐ Year end payroll reports and reconciliations
  - ☐ None received
  - ☐ Other______________________________
  - ☐ Details of Any Fixed Asset Changes. Please provide a complete depreciation schedule if you are a new client.
    - ○ Fixed Asset Purchases: Description of asset, Purchase Date or Date Asset became useful, whichever is later
    - ○ Fixed Asset Sales: Description of asset, Date of Sale, Sale Price
    - ○ Fixed Asset Disposal or Salvage: Description of asset, date of disposal
    - ○ No changes were made to the fixed assets this year
- **Other information, check all that apply**
  - ☐ New business loans details
    - Provide the following: Lender, amount, terms, etc.
  - ☐ Value of inventory of materials or goods you sell that were on hand at year end, if applicable to your business
  - ☐ Listing of all business taxes payable in 2013 for 2012☐ liabilities, check all that apply
    - ○ sales tax ○ workers' compensation ○ CAT ○ Other ____________
  - ☐ Details of Home Office Expenses, if applicable
    - ○ Utilities: gas, electric, water, garbage
    - ○ Home insurance
    - ○ Rent, mortgage interest and/or real estate taxes paid
    - ○ Repairs and maintenance
    - ○ Details of improvements, including date (ie: new roof, driveway, etc.)
    - ○ Office specific repairs or improvements, detail separately
  - ☐ Auto Expenses on a personal vehicle related to business activity
    - ○ Make and model of automobile used in business activity
    - ○ Mileage information: Total mileage + total business mileage
    - ○ Interest paid on auto loan
    - ○ If actual expenses are to be used in lieu of standard mileage rates, you will need to provide
      - Auto loans and lease documents if not on file
      - List of actual expenses for gas, maintenance, etc.

2012 Rental Property Owners
Basic List of Additional Information Needed

____
Taxpayer(s) Name

The intent of this checklist is to assist you in gathering your necessary tax data needed to complete your tax return(s). The list is not intended to be exhaustive. If you have specific questions regarding rental income, expenses or deductions, please call our office to schedule an appointment.

- ☐ **Submit records of rental income and expenses. asset purchases, etc.** Check applicable form of submission.
  - ☐ Quickbooks Accountant's Copy
    - ▪ Provide QB Version, File Name, User Name, and Password
  - ☐ Spreadsheet
  - ☐ Other ______________________________

➢*IMPORTANT: Regardless of your record keeping method – income and expenses* *__must be__* *sortable by property*➢

- ☐ **Copies of all tax statements received for your rental properties and/or that you submitted to the IRS, check all that apply.**
  - ○ 1099-Misc (Note: be sure to include all your income even if you did not receive a 1099)
  - ○ 1099-K
  - ○ 1099-Int
  - ○ 1098
  - ○ None received
  - ○ Other______________________________

- ☐ **Details of Fixed Asset Changes**
  - ○ Purchase of new rental property
    - ▪ Provide copy of settlement statement
  - ○ Sale of rental property
    - ▪ Provide copy of settlement statement
  - ○ Property improvements made
    - ▪ Provide description of improvement, date it became useful and the cost. Must be listed by property.
  - ○ Assets were purchased (i.e. new appliances)
    - ▪ Provide asset description, date of purchase or usefulness, and the cost. Must be listed by property.

- ☐ **Other information, check all that apply**
  - ○ Auto Expenses on a personal vehicle related to rental activity
    - ☐ Make and model of automobile used in rental activity
    - ☐ Mileage information: Total mileage + total business mileage
    - ☐ Interest paid on auto loan
    - ☐ If actual expenses are to be used in lieu of standard mileage rates, you will need to provide
      - ▪ Auto loans and lease documents if not on file
      - ▪ List of actual expenses for gas, maintenance, etc.
  - ○ Other ______________________________
  - ○ Other ______________________________