

212 TAX / JLD TAX BUSINESS ORGANIZER

Business Type (Select One):	LLC	S Corporation	C Corporation	Partnership	Other	l	
What is the state of Formation?						1	
If an S Corporation, please provide	the following information:		-				
S Corp Election date with IRS							
S Corp Election date with State,							
IF YOU ARE FILING FOR THE FIRST 1 IF YOU ARE A NEW CLIENT PLEASE			OVED AS AN S-CORP				
Business Name:							
D/B/A, if applicable:							
Employer ID # (EIN)							
Date Business Started							
Principal Business Activity What acccouting method does the	husiness use?	Cash	Accrual	Other			
Address	business use:	cash	Accidai	otilei			
Suite #					<u>.</u>		
City							
State							
Zip							
Phone Number Email Address							
Name of Member/Partner/Owner	Ownership %	Email	Phone Number	Address		SSN, EIN	or ITIN #
Please provide your business bank	account information:			_			
Bank Routing #		Bank Account #					
Checking or Savings?		Bank Name				VEC	NO
At the End of the year did the busin	ess own directly 20% or own d	irectly or indirectly 50% or mo	re of the voting power of any f	oreign or domestic corporation?		YES	NO
At the End of the year did the busin	ess own directly 20% or more	or own directly or indirectly 50)% or more in the profit, loss, o	or capital in any foreign or domestic	business, LLC or in the		
beneficial interest of a trust?							
	- harris and a later that a second second	lled an meduce d2					
During the tax year did the business	s have any debt that was cance	lied or reduced?				للـــــل ا	
Did the entity conduct business in n	nore than one state?					(<u> </u>	
If yes, please list all states:							
Does the business have any foreign	bank accounts?						
	tu in a like kind such ange?						
Did the business receive any proper	ty in a like kind exchange?					 U	
Did the business make any paymen	ts that would require the issua	nce of 1099 forms?					
If yes, did the business issue all requ							
During the year did the business ha	ve any change in ownership?					L	
What was the value of your assets &	liabilitios at the end of the ve	ar including all business bank	accounts 2				
Asset / Lial			Balance :				
	\$ -		\$ -]			
	\$ -		\$-				
	\$ -		\$ -				
	\$ -		\$ -				
	\$ - \$ -		\$ \$	•			
	Y		Y -	J			
TAXPAYER SIGNATURE:			DATE:				

TAXPAYER SIGNATURE: Name: Titlo:

Title:

Page 2 of 2 212 TAX / JLD TAX BUSINESS ORGANIZER

		-NFC		
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)		
Business Gifts (up to \$ 25 per client) Business Meals				
		o promiume 2	VES/NO	
			TES/NO	
		· · ·		
	•			
		de commuting miles)		
	-			
		nce:		
	Is the vehicle leased / financed / paid-off?			
		provide:		
	Date of Purchase			
	Purchase Price			
	Annual Car Loan Interest			
	If leased, please provide monthly lease payment:			
	If leased, please provide sta	rt date of lease:		
	If leased, please provide Fair Market Value:			
	For assets that were purchas	sed, sold or disposed of durir	ng tax year please list the fol	lowing :
	(inluding any cell phones, t	ablets, computers, equipme	nt, furniture, and/or softwa	re)
	· · · · · · · · · · · · · · · · · · ·			
	Item Description	Specify if purchased, sold	Date of purchase, sale, or	Price of purchase, sale, or
				Price of purchase, sale, or disposition :
		Specify if purchased, sold	Date of purchase, sale, or	
		Specify if purchased, sold	Date of purchase, sale, or	
		Specify if purchased, sold	Date of purchase, sale, or	
		Specify if purchased, sold	Date of purchase, sale, or	
		Specify if purchased, sold	Date of purchase, sale, or	
		Specify if purchased, sold	Date of purchase, sale, or	
		Specify if purchased, sold	Date of purchase, sale, or	
		Specify if purchased, sold	Date of purchase, sale, or	
		Specify if purchased, sold	Date of purchase, sale, or	
		Specify if purchased, sold	Date of purchase, sale, or	
		Specify if purchased, sold	Date of purchase, sale, or	
		Specify if purchased, sold	Date of purchase, sale, or	
ons made by members/	Item Description	Specify if purchased, sold	Date of purchase, sale, or	
ons made by members/	Item Description	Specify if purchased, sold	Date of purchase, sale, or	
ons made by members/ Distribution	Item Description	Specify if purchased, sold	Date of purchase, sale, or	
	Item Description	Specify if purchased, sold	Date of purchase, sale, or	
	Item Description	Specify if purchased, sold	Date of purchase, sale, or	
	Item Description	Specify if purchased, sold	Date of purchase, sale, or	
	Item Description	Specify if purchased, sold	Date of purchase, sale, or	
	Item Description	Specify if purchased, sold	Date of purchase, sale, or	
		Income on 1099-K Other income (not on 1099s TOTAL GROSS INCOME: Did you pay health insurance If YES, how much ? BUSINESS VEHICLE EXPENSID Make, Model, and Year of Ca Total miles driven during the Business miles (do not include Gas: Insurance & Registration: Parking: Cleaning, Repairs, Maintena Tolls: Is the vehicle leased / finance If financed/paid-off, please point Date of Purchase Purchase Price Annual Car Loan Interest If leased, please provide mo If leased, please provide Fail For assets that were purchase	Income on 1099-MISC, 1099-NECIncome on 1099-KOther income (not on 1099s)TOTAL GROSS INCOME:Did you pay health insurance premiums ?If YES, how much ?BUSINESS VEHICLE EXPENSES:Make, Model, and Year of Car:Total miles driven during the year:Business miles (do not include commuting miles)Gas:Insurance & Registration:Parking:Cleaning, Repairs, Maintenance:Tolls:Is the vehicle leased / financed / paid-off?If financed/paid-off, please provide:Date of PurchasePurchase PriceAnnual Car Loan InterestIf leased, please provide start date of lease:If leased, please provide Fair Market Value:For assets that were purchased, sold or disposed of durint	Income on 1099-MISC, 1099-NECIncomeIncome on 1099-KIncomeOther income (not on 1099s)IncomeTOTAL GROSS INCOME:IncomeDid you pay health insurance premiums ?YES/NOIf YES, how much ?IncomeBUSINESS VEHICLE EXPENSES:IncomeMake, Model, and Year of Car:IncomeTotal miles driven during the year:IncomeBusiness miles (do not include commuting miles)IncomeGas:Insurance & Registration:Parking:Insurance & Registration:Parking:Insurance & Repairs, Maintenance:Tolls:Is the vehicle leased / financed / paid-off?If financed/paid-off, please provide:IncomeDate of PurchaseIncomePurchase PriceInnual Car Loan InterestIf leased, please provide start date of lease:Income