

Client Organizer - Small Business - Sole Proprietor - 2019

Important Notice - INCREASED PENALTIES for non-filing of 1099s

1099s must be issued to any individual (not c or s corp) paid over \$600 last year. Due by 1/31

The business belongs to _____ you or _____ spouse

Schedule C

Do not complete if you have computer printouts for these figures

Income - 1099 <i>(bring copies of 1099s)</i>			
Income - non-1099			
Total Income			
Cost of Sales - Labor <i>(see blue below)</i>			
Cost of Sales - Purchases			
Total Cost of Sales			
Advertising		Licenses	
Auto/truck <i>(see below)</i>		Office expense	
Bank charges		Outside services	
Commissions		Repairs	
Delivery/Postage		Rent	
Dues - subscriptions		Seminars, education (work related)	
Meals		Supplies/Small Tools	
Equipment lease/rental		Taxes	
Gifts (\$25/person/year)		Telephone	
Health Insurance		Travel for business	
Insurance		Uniforms (include cleaning)	
Interest		Utilities	
Internet/Website		Wages	
Legal/professional		Other	
Other		Other	
Total Expenses			
NET INCOME			

Office in Home *(restrictions apply**)*

****Office in home must be used regularly and exclusively for business tasks not performed in another office**

In Square Feet a) Total Home _____
 b) Office _____

Expenses

Maintenance, other _____
 Home Insurance _____
 HOA fees _____
 Utilities _____

Auto/ Truck

Vehicle description _____
 Total miles (personal & business) _____
 Mileage Jan 1st _____
 Mileage Dec 31st _____
 Business miles _____
 Do you have written records to show the business purpose? Yes / No

Equipment/Improvements (Purchased or Sold this year)

Equipment Description	Date Bought	Purchase Price	Date Sold	Selling price

Attach copies of payroll tax returns (4 quarterly 941, SUTA, 940, W3) and 1099s

Meals must have a clear business purpose. Document name of people and topic of discussion

QuickBooks -We make a limited, cursory review of file contents and cannot be held responsible for the contents