

Small Business Organizer

(for Sole Proprietors & Single Member LLCs)

Prior to completing this form, please download the organizer. Please do not enter your information in preview mode, as it may not save your entries.

Section 1: General Information (to be completed by all business owners)

Business Name:

Business Address (if different than mailing address for your tax return):

Brief description of business:

Business Activity is owned by:

EIN (if applicable):

If new in 2021, business start date:

Did your business receive a 1099-MISC, 1099-NEC or 1099-K? If yes, please upload.

Did you issue any 1099s in 2021?

Did you employ business employees?

If yes, please upload your 2021 Form W-3 (Summary of your W-2 Wages)

Did you receive a PPP loan in 2021? If yes, how much?

Amount of PPP Loan:

\$

Do you anticipate full forgiveness of your PPP loan?

Did you have any business related mileage? If yes, please complete Section 2.

Did you use a portion of your home for regular and exclusive business use? If yes, please complete section 3.

Did you make purchases larger than \$2,500? If yes, please complete Section 4.

Do you maintain a detailed record of your income and expenses for the business?

If yes, please upload a detailed summary or provide access to your QuickBooks account.

If no, please complete Section 5.

Section 2: Business Use of Auto

If you used your automobile for conducting business, you can claim expenses for business use of your vehicle. Taxpayers can take either actual expenses or standard mileage; if you are taking standard mileage, there is no need to fill in actual expenses.

Make, Model and Year:

Date placed in Service:

For 2021, enter the number of miles this vehicle was used for the following:

Business Use:

Personal Use (including commuting):

Even if you are claiming standard mileage we are allowed to include the following:

Parking

\$

Tolls

\$

Actual Expenses (if not claiming standard mileage rates)

If purchased in 2021:

Purchase Date:

Purchase Price:

\$

Garage Rent

\$

Repairs

\$

Gas/Oil

\$

Tires

\$

Insurance

\$

Tolls

\$

Licenses

\$

Registration Fees

\$

Parking

\$

Other

\$

Lease Payments

\$

Do you have another vehicle for personal use?

Was your vehicle available for your use during off hours?

Do you have evidence to support business use of your vehicle? (i.e. mileage log)

If yes, is the evidence written in the form of a log or calendar?

Section 3: Business Use of Home

Square footage of home office:

Total square footage of home:

Please provide Form 1098 for home mortgage interest.

Rent	\$ <input type="text"/>	Repairs (Office)	\$ <input type="text"/>
Real Estate Tax	\$ <input type="text"/>	Repairs (Home)	\$ <input type="text"/>
Insurance	\$ <input type="text"/>	Cleaning	\$ <input type="text"/>
Utilities	\$ <input type="text"/>	Other	\$ <input type="text"/>
HOA Fees	\$ <input type="text"/>		

Section 4: Purchases over \$2,500

Description of purchase	Date purchased	Cost
<input type="text"/>		
<input type="text"/>		

Section 5: Summary of Income & Expenses

Income: \$ Other Income: \$

Business Expenses

Advertising	\$ <input type="text"/>	Supplies	\$ <input type="text"/>
Commissions	\$ <input type="text"/>	Taxes & Licenses	\$ <input type="text"/>
Contract Labor	\$ <input type="text"/>	Travel	\$ <input type="text"/>
Employee Benefit Programs	\$ <input type="text"/>	Meals	\$ <input type="text"/>
Business Interest Paid	\$ <input type="text"/>	Utilities	\$ <input type="text"/>
Office Expenses	\$ <input type="text"/>	Wages	\$ <input type="text"/>
Professional Dues	\$ <input type="text"/>	Telephone	\$ <input type="text"/>
Rent or Lease (Building)	\$ <input type="text"/>	Continuing Ed	\$ <input type="text"/>
Rent or Lease (Equipment)	\$ <input type="text"/>	Internet	\$ <input type="text"/>
Repairs & Maintenance	\$ <input type="text"/>	Other Expenses	\$ <input type="text"/>