

WELLER CONSULTING

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Business Tax Return Organizer 2020

Please complete a separate organizer for each entity requiring a tax return

If this business is being treated as a Sole Proprietorship (this includes Single Member Disregarded LLCs) please do not use this form instead use the Sole Proprietorship organizer.

Your Name _____ Phone _____ Email _____

Name of business entity _____

EIN/Tax ID # _____

Type of Business Partnership C Corporation S Corporation LLC*

*If LLC what is the tax treatment Partnership C Corporation S Corporation Not Sure**

**If unsure what your tax treatment is for your LLC, please include the letter from the IRS assigning your tax ID Number

What is the year end of this business _____

Cell Phone Expense

This is another area that the IRS is focusing on. Cell phone expenses must be apportioned for business and personal use. The IRS does not believe that cell phones are used 100% for business unless you have a separate cell phone for each. We must report the personal and business use percentage on the tax return. These percentages should be supported by a written record such as your cell phone bills calls marked as business or personal.

Total Cell Phone Expenses _____ Do you have a separate phone for business? _____

Business % _____ Personal % _____

Car and Truck Expenses

If you used a car or truck in this business please complete the Car and Truck Expense organizer.

Please send us a copy of the following:

- Printout of Balance Sheet and Profit & Loss Reports (If you do not have a P&L, send over a spreadsheet summarized by income and expense category, or fill out the sole proprietor organizer)
- Copies of prior years tax returns (if not already in our possession)
- IRS Letter granting Employer Identification number (if this is first year for us to prepare your return)
- IRS letter accepting 8832 corporation election (if applicable)
- IRS letter accepting 2553 small business corporation (S Corp) election (if applicable)
- Depreciation schedule from prior tax preparer (if applicable and not in previous years return copies)

Please complete below if your business purchased or leased any equipment, furniture, vehicles, fixtures or real estate.

Asset Description	Cost	Date	Lease or Purchase
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____