



MPTS - BUSINESS ORGANIZER CHECKLIST

TAX YEAR

BUSINESS INFO

BUSINESS NAME

BUSINESS EIN, if separate from owner(s)

BUSINESS INDUSTRY

BUSINESS ENTITY TYPE (i.e. Sole Proprietorship, LLC, Partnership, S-Corp, C-Corp)

BUSINESS PHYSICAL ADDRESS

BUSINESS CITY, STATE, ZIP

BUSINESS PHONE NUMBER

BUSINESS EMAIL ADDRESS

OWNER/MEMBER 1 NAME

OWNER/MEMBER 1 SSN

OWNER/MEMBER 1 PHYSICAL ADDRESS

OWNER/MEMBER 1 CITY, STATE, ZIP

OWNER/MEMBER 1 PHONE NUMBER

OWNER/MEMBER 1 EMAIL ADDRESS

OWNER/MEMBER 2 NAME

OWNER/MEMBER 2 SSN

OWNER/MEMBER 2 PHYSICAL ADDRESS

OWNER/MEMBER 2 CITY, STATE, ZIP

OWNER/MEMBER 2 PHONE NUMBER

OWNER/MEMBER 2 EMAIL ADDRESS

OWNER/MEMBER 3 NAME

OWNER/MEMBER 3 SSN

OWNER/MEMBER 3 PHYSICAL ADDRESS

OWNER/MEMBER 3 CITY, STATE, ZIP

OWNER/MEMBER 3 PHONE NUMBER

OWNER/MEMBER 3 EMAIL ADDRESS

Did you have any of the following for the last Tax Year? (Please check off or enter annual amount)

COMMON INCOME

Owner/Officers' compensation? (W2)

Business Interest and/or Dividend income? (1099INT; 1099DIV)

Self employment income/loss? (1099MISC or other income)

Rental income/loss?

Income/loss from a separate, related Corp., LLC, Partnerships, Estate/Trust? (K1)

If you own a business, did you register with the State (i.e. LLC, Corp or Assoc.)?

If business is registered with the State, did you file a state franchise tax return?

If you own a business, did you/do you need to file 1099MISC forms?

Farm or livestock income/loss?

Sale of business capital asset(s)?

Did you purchase and sell the same or another house(s) within last 2 years?

Cancelled debt(s)? (1099C)

Income subject to state tax (n/a for TX income)?

Other reportable income(s)?

COMMON POSSIBLE EXPENSES, DEDUCTIONS AND CREDITS

Do you have a business Profit & Loss Statement? Balance Sheet?

Salaries, Wages and guaranteed partner payments?

Required to issue Form 1099MISC to contractors, etc.?

Advertising expense?

Travel expenses (lodging, airfare, taxi, etc.)?

Auto Expenses? If yes, please complete the next few questions:

Vehicle Description?

Date purchased?

Date placed in service?

Paid Vehicle interest on loans?

Miles: Total (Business, Commuting and Personal)

Miles: Business (break out separately)

Own Vehicle?

Available while off duty?

Is it a Truck or SUV?

Written evidence of the use and mileage?

Cleaning, maintenance, repairs, etc. expenses?

Business Insurance expenses?

Legal and Professional Fees?

Rental Income Management Fees?

Business Supplies expenses?

Office Supplies expenses?

Purchased large business capital assets? Depreciable Assets?

Business Tax or Licenses expenses?

Utilities? (if cell phone, what is business %?)

Office in Home expenses?

Contract Labor expenses?

Business Rental or Lease payments?

Business meals?

Contributed to an IRA, SEP, Keogh, SIMPLE, 401(k) or 403(b) for employees?

Bankruptcy proceeding(s)?

Received notice(s) from the IRS or state dept(s)?

Paid business interest and/or property taxes? (1098, etc.)

Gave cash and/or non-cash contributions to a qualified charity(ies)?

Gave over \$500 in non-cash property/contributions to charity(ies)?

Made estimated tax payments for the tax year or prior-year carryover? (1040ES)

Any other deduction(s) or credit(s) for which you may qualify?

TAX MATTERS OFFICER Signature

DATE

*This is not an exhaustive list of income/deductions/credits; it's the taxpayer(s) responsibility to make the preparer aware of items that may possibly affect their tax file.