# Your business at a glance

One checklist per business. Use N/A or Not sure when appropriate.

**Tax year (YYYY)**

**Owner full name**

**Business / trade name**

**EIN, if applicable**

**Phone**

**Email**

**Street address**

**City**

**State**

**ZIP code**

**Business activity / services**

**Business start date**

**Accounting method**

Select

**Opened or closed this year?**

Select

**Did you materially participate?**

Select

**Any ownership changes?**

Select

**Explain dates, ownership changes or anything unusual.**

**Prior Schedule C and taxpayer intake**

Select

**Prior depreciation / asset schedule**

Select

# Income and inventory

Enter separate totals. Attach your books and all income forms; do not add the same income twice.

## Business income

**Gross receipts / sales ($)**

**Refunds / returns ($)**

**Other business income ($)**

**Income / expense report**

Select

**1099-NEC**

Select

**1099-MISC**

Select

**1099-K**

Select

**Explain income forms that differ from your books, duplicate forms or corrected forms.**

## Inventory / cost of goods - if applicable

**Beginning inventory ($)**

**Purchases ($)**

**Direct labor ($)**

**Other cost of goods ($)**

**Ending inventory ($)**

**Inventory applies?**

Select

**Inventory notes or missing records.**



Organizer only - not a tax return, payment or filing authorization. Preparer review required.

# Expense totals - one box per category

Use your categorized report. Keep receipts; mark estimates and personal amounts in notes.

**Advertising ($)**

**Commissions ($)**

**Contract labor ($)**

**Wages ($)**

**Employee benefits ($)**

**Rent / leases ($)**

**Utilities ($)**

**Insurance ($)**

**Repairs ($)**

**Supplies ($)**

**Office costs ($)**

**Interest ($)**

**Taxes / licenses ($)**

**Legal / accounting ($)**

**Travel ($)**

**Meals ($)**

**Other expenses ($)**

**Supporting receipts**

Select

**Describe other expenses, estimates, personal expenses included in totals or uncertain categories.**

**Payments needing Form 1099?**

Select

**Required 1099 forms**

Select

**Contractor / information-return questions.**

# Vehicles, assets and home office

Use a separate sheet for additional vehicles or assets. Your preparer determines treatment.

## Vehicle - repeat on an extra sheet if needed

**Vehicle description**

**Date placed in service**

**Purchase cost / lease cost ($)**

**Business use (%)**

**Business miles**

**Commuting miles**

**Total miles**

**Available for personal use?**

Select

**Another personal vehicle?**

Select

**Written use records?**

Select

**Mileage and expense log**

Select

## Assets and home office

**Assets bought/sold: description, cost, service/sale dates and proceeds. Attach asset schedule.**

**Office area (sq. ft.)**

**Total home area (sq. ft.)**

**Office-use dates**

**Exclusive business use?**

Select

**Regular business use?**

Select

**Home rent / interest ($)**

**Home property taxes ($)**

**Home insurance ($)**

**Home utilities ($)**

**Home repairs ($)**

# Finish and upload

You can save an incomplete copy and come back later. Tell us what is still missing.

**Loss carryovers, related-party transactions or other unusual income/expenses.**

**Supporting files included or already uploaded.**

**Missing records, estimates, questions and expected availability.**

**Completed by (owner / authorized person)**

**Date completed**

**I checked my entries and flagged missing items**

Select

Next: save your PDF with the tax year in its filename. Sign in to your client portal, choose Documents > Upload, and upload this checklist with requested records.