

**Income Tax Interview
Worksheet**

Business Information

Name of Business:	
Owner:	Federal Tax ID #:
Type of Business: ___ Sole Proprietorship ___ Corporation ___ Partnership ___ LLC	

Revenue

<u>Name</u>	<u>Received 1099?</u>	<u>Amount</u>

Business Expenses ---- **Please DO NOT SEND your business receipts.**
Enter your "amounts" on the proper line item.

<u>Type of Expense</u>	<u>Amount</u>
Advertising	
Business Meals & Entertainment	
Business Travel	
License/Subscriptions/Training	
Medical & Employee Expenses	
Miscellaneous	
Office Expenses & Supplies	
Postage	
Professional Fees	
Bank & Finance Charges/Credit Cards	
Insurance – Auto, Liability	
Insurance – Health	
Taxes	
Chargebacks & Refunds	
Auto Expenses	
Rent or Lease	
Repairs & Maintenance	
Utilities (Telephone, Cell Phone, Water, Electric, Gas, Internet)	
Shop or Business Supplies	
Contract Labor payments	
Salaries to Employees	
Other Miscellaneous	
Other Miscellaneous	
Other Miscellaneous	

Equipment Purchases

<u>Type of Asset</u>	<u>Amount</u>
Furniture	
Machines & Equipment	
Computer(s)	
Vehicle (list each separately)	