**BUSINESS INFORMATION SHEET**

1. **COMPANY INFORMATION**

Business Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

EIN: \_\_\_\_\_-\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Business Start Date: MM\_\_\_\_\_\_DD\_\_\_\_\_\_YEAR\_\_\_\_\_\_\_\_\_

Business Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

City: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_State: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Zip Code: \_\_\_\_\_\_\_\_\_\_\_

Phone Number: (\_\_\_\_) -\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Entity Type: ⃝ S Corp ⃝C Corp ⃝LLC ⃝LLP ⃝PLLC ⃝PLC ⃝SP

Did your business file a tax return for 2013? ⃝Yes ⃝No

1. **OWNER INFORMATION**

Owner Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ % of Ownership \_\_\_\_\_\_\_\_\_\_

Social Security Number: \_\_\_\_\_\_\_\_-\_\_\_\_\_\_\_\_-\_\_\_\_\_\_\_\_ Date of Birth: MM\_\_\_\_DD\_\_\_\_YEAR\_\_\_\_\_\_\_

Owner Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

City: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_State: \_\_\_\_\_\_\_\_\_Zip Code: \_\_\_\_\_\_\_\_\_\_\_\_\_

Phone Number: (\_\_\_\_\_\_)\_\_\_\_\_\_\_\_- \_\_\_\_\_\_\_\_\_\_\_\_\_\_Email:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Owner Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_% of Ownership\_\_\_\_\_\_\_\_\_\_ Social Security Number: \_\_\_\_\_\_\_\_-\_\_\_\_\_\_\_\_-\_\_\_\_\_\_\_\_Date of Birth: MM\_\_\_\_DD\_\_\_\_YEAR\_\_\_\_\_\_\_

Owner Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

City: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_State: \_\_\_\_\_\_\_\_\_Zip Code: \_\_\_\_\_\_\_\_\_\_\_

Phone Number: (\_\_\_\_\_\_)\_\_\_\_\_\_\_\_-\_\_\_\_\_\_\_\_\_\_\_\_\_\_Email:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

NOTES: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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**BUSINESS INCOME AND EXPENSES**

***You do NOT need to complete this form if you are using Quickbooks or an accounting program. Please provide us with a P&L and Balance Sheet for the end of the year.***

**BUSINESS NAME** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**YEAR** \_\_\_\_\_\_\_\_\_\_\_\_

**TOTAL INCOME FROM BUSINESS $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

COST OF GOODS SOLD

Total dollar amt of all inventory at the beginning of the year $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Total dollar amt of all purchases for the year $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Total dollar amt of all inventory at the end of the year $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Total Sub-Contractors expense **$\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

EXPENSES: Total receipts for the year, for each item (examples)

 Advertising (brochures, ads, business cards, flyers, signs) $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Vehicle Expense (oil change, service, repairs, gas) $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Wages (paid to employees) $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Insurance (business insurance) $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Interest Paid $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Legal / professional fees (lawyer, taxes, consultants) $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Office Supplies (pens paper staples, etc) $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Rent or Lease (office rent, storage rent) $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Equipment / Machinery Rental (for business use) $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Equipment / Machinery Purchase (for business use) $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Tools (small tools needed to run the business) $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Repairs / Maintenance (computers, or equipment for office) $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Tax and License (fees paid -business related) $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Travel Expenses (car rental, air travel, tolls, parking fees) $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Meals (meals related to business meetings) $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Entertainment (business related meetings) $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Utilities (gas, electricity, business related) $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phones (landline, fax line, or cell related to business) $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Internet (fees paid for computer connections, websites) **$\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Other/Misc**

Item: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Item: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Major purchases over $1000**

Item: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Purchase Price: $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Item: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Purchase Price: $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Total Business Miles**

1st vehicle \_\_\_\_\_\_\_\_\_\_\_\_\_ Miles

2nd vehicle \_\_\_\_\_\_\_\_\_\_\_\_\_ Miles