

The Tax Shoppe

2013 BUSINESS CHECKLIST

Mail: 155 Lake St., Ramsey, NJ 07446

Fax: 201-327-4930

Email: the_tax_shoppe@yahoo.com

Questions? Call us at 201-327-4965

Business Information	Business Name		EIN
	Business Address		
	Business Phone	Cell Phone #	E-mail

Business Entity Type: (select one below)

Sole Proprietor

Date of Formation: _____

Partnership

State(s) of Formation: _____

Corporation

Name of person who formed this entity

S-Corporation

(provide copy of Election to be S-Corp Form 2553) Who is your Registered Agent?

Estate / Trust

Non-Profit Organization

Do you have a copy of your formation documents? Yes No

State LLC Formation (You must check one of the Boxes above as well)

If yes, please provide us with all copies of formation documents. (Federal and State)

BUSINESS OWNERS (If additional owners, please list on separate page)

Name and Address	Home Phone	Social Security Number (required)		Percentage of Ownership
*Contact Member				

PERSONAL PROTECTION PLAN (PPP), It's insurance for our services should you receive an IRS or State letter

PPP Business Pricing according to Revenue:

Revenue under 500k \$39

Revenue over 500k ...\$49

Revenue over \$3 million \$75

Sole proprietors include PPP on personal

return \$39

YES! I accept the Personal Protection Plan. Please include the fee in with my preparation fee.

Initial - I accept coverage

No, I decline PPP. I understand that should I need addq services, I will be billed at a rate of \$75/hour. (Average audit-3Hr)

Initial - I deny coverage

Payment Info (Required)	CREDIT CARD		
	MC / Visa / AMEX / Discover		Signature
	Name on Card & Billing Zip Code	Credit Card Number	Expiration Date

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Gross Receipts (Total Income including sales tax): _____

Total Auto Mileage		Fees / Licenses / Permits		Travel Exp(Air, Ground cost)	
Business Auto Mileage		Insurance incl. Health		Meals / Entertainment	
Tolls/Parking/Car Wash		Advertising		W-2s Issued / Salaries paid	
Purchase of Goods Sold		Cellular/Telephone		Sub Contractor/Casual labor (1099s)	
Opening Inventory		Tools Purch or Repair		Work Clothes/Uniforms	
Closing Inventory		Publications / Education		Safety Equip.	
Packaging, etc		Internet services		Utilities	
Postage/Freight		IT Services		Rent or Home Office (list below)	
Office Supplies & Equip		Equip Purchased/Leased		Gifts	
Repairs/Maintenance		Publications/Subscriptions		Misc. Expenses	

For Home Office: TOTAL house square footage & portion that is dedicated office space _____

List amounts for paid for Home Office: utilities, repairs, maintenance, insurance, rent paid/or if owned, home mortgage & taxes. **New IRS ruling** allows, without detail, \$5 per square footage. So, if you want to use this method, all we need is the total square footage of your home office.

COMMENTS/QUESTIONS/SPECIAL CONCERNS

If there are any special issues you would like us to address, please write them here.
