

## BUSINESS INFORMATION SHEET

**DATE:** \_\_\_\_\_

### I. 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 2015? ☐ Yes ☐ No

### II. 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:

---

---

---

---



## 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)

\$ \_\_\_\_\_

### Major purchases over \$1000

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

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

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

### Other/Misc

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

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

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

Total Business Miles

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

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