

Annual Business Tax Organizer

A practical, fillable 3-page tax preparation organizer

Use this general organizer to summarize self-employed business income, expenses and vehicle use for your tax appointment.

1 / What to gather before your appointment

- W-2, Forms 1099, gross sales reports and cash-sales totals
- Business bank statements / highlighted credit-card statements
- Receipts and invoices retained in your own records
- Mileage records and beginning/end odometer photos
- Equipment purchases, estimated tax payments and other major changes

2 / Expenses and issues to review

- | | |
|---|---|
| ☐ Advertising and promotions | ☐ Office supplies |
| ☐ Materials / inventory | ☐ Insurance |
| ☐ Rent / lease payments | ☐ Utilities / telephone / internet |
| ☐ Professional fees | ☐ Contract labor |
| ☐ Travel and lodging | ☐ Equipment and repairs |

IMPORTANT TAX TREATMENT

Enter annual totals by category. Keep records supporting every amount and be prepared to supply individual receipts, invoices, mileage logs or other documentation if requested.

Questions or additional information for Steven

This guide is a preparation aid, not a guarantee that an expense qualifies.

Income & Expense Summary

Enter annual totals by category; do not enter each individual purchase.

Client name / business name

Tax year

Trade or activity

A / Total income for the year

Gross business receipts (all sources)

1099-NEC amount (included above)

1099-K amount (included above)

Other income NOT included above

Refunds / returns / allowances

B / Total expenses for the year (only business portion)

Advertising and promotions

Office supplies

Materials / inventory

Insurance

Rent / lease payments

Utilities / telephone / internet

Professional fees

Contract labor

Travel and lodging

Equipment and repairs

Other qualified business expenses

Other business / processing fees

C / What I would like Steven to review

Notes, unusual transactions, changes during the year

Vehicle & Mileage Summary

Complete this page only if you have business vehicle use to review.

Year / make / model / vehicle ID

Date first used for business

Beginning odometer reading

Ending odometer reading

Total annual miles

Business miles (total)

Personal miles

Commuting miles

Trip sample log - enter dates, destinations, business purpose and mileage:

Date	From / to	Business purpose	Miles

RECORDKEEPING REMINDERS

Photograph your odometer at the beginning and end of the year when possible. Track the business purpose of each trip. Travel between home and a regular workplace is usually commuting, not business mileage.

Representative sampling may be used only with other evidence showing the sample accurately reflects business use for the whole year; one month times 12 is not automatically sufficient.

Credit-card statements can support payment but may need receipts or invoices to establish what was purchased and its business purpose. Keep originals; provide annual totals for preparation.