



BUSINESS TAX ORGANIZER – 2019

STEP 1: BUSINESS INFORMATION (only fill out if your business started in 2019, or if anything has changed)

Business Name _____ EIN _____ Date Started _____
Mailing Address _____ City _____ State _____ Zip _____

Owners' Information:

Name _____ SSN _____ Percent Owned _____
Mailing address _____

Name _____ SSN _____ Percent Owned _____
Mailing address _____

Name _____ SSN _____ Percent Owned _____
Mailing address _____

Do you intend for the business to be taxed as an S-Corporation for the first time? Yes No N/A.
If Yes, please provide copy of IRS notices/Forms indicating that it should be taxed as such.

STEP 2: FINANCIAL

Please provide the following:

2018 Tax Returns, Federal and State (if Better Accounting did not prepare them)

2019 Income and Expenses (Profit and Loss Statement)

12/31/2019 Balance Sheet

Description of New Assets Purchased

STEP 3: MISCELLANEOUS INFORMATION

1. Did you pay payments to nonemployees (over \$600 each) that would require you to file 1099 Forms? Yes No
If Yes, would you like us to help you prepare these forms? Yes No

2. Is there anything else you think we need to know? Please write it below:

