Small Business Form

New Clients Only: Please make sure to attach a copy of your 2023 tax return.

Business Information

Address: Date Business Started:	Name of Business:			Owner Name:				
EIN (SS4-Form/EIN Letter): Type of Industry: Type of Entity (select one): Schedule C LLC – Single Member LLC – Multi Member S-Corp C-Corp Vehicle Use for Business Year/Make/Model Date Placed in Service Purchased Price Purchased Date Mileage If business use is over 50%, include these totals: Please attach information for additional vehicles. Business Miles Personal Miles Total Miles Insurance Repairs Cother S Check any that apply: Was the vehicle available for personal use during business hours? Do you have another vehicle available for personal use? Do you have written documentation to support these expenses? Business Use of Home Are you claiming use of a home office? Yes No If yes, please provide the following information: 1. How many months was your home used for business? 2. How much square footage was used exclusively for business? 3. What is the total square footage of the home? Additional Expenses (please attach information for any additional expenses) Rent (not mortgage) S Garbage Member LLC – Multi Member S-Corp C-Corp Type of Industry: Purchased Price Purchased Price Purchased Price Purchased Date Purchased Price Purchased Price Purchased Price Purchased Price Purchased Date Purchased Price Purchased Price Purchased Price Purchased Price Purchased Date Purchased Price Purchased Price Purchased Price Purchased Date Purchased Price Purchased Price Purchased Date Purchased Price Purch								
Type of Entity (select one): Schedule C								
Vehicle Use for Business Year/Make/Model Date Placed in Service Purchased Price Purchased Date	Type of Entity (se	lect one):		71	J			
Mileage If business use is over 50%, include these totals: Please attach information for additional vehicles. Fuel \$ Registration \$	☐ Schedule C	☐ LLC – Single	Member	LLC – Multi	Member [☐ S-C	orp 🗌 C-Corp	
Mileage Please attach information for additional vehicles. Business Miles Personal Miles Total Miles Insurance \$ Loan Interest \$ Repairs \$ Other \$ Check any that apply: Was the vehicle available for personal use during business hours? Do you have another vehicle available for personal use? Do you have written documentation to support these expenses? Business Use of Home Are you claiming use of a home office?	Vehicle Use for	r Business						
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Business Miles Personal Miles Total Miles Insurance \$ Loan Interest \$ Check any that apply: Was the vehicle available for personal use during business hours? Do you have another vehicle available for personal use? Do you have written documentation to support these expenses?	Please attach information for additiona		onal vehicles.	Fuel \$		Registration \$		
Repairs \$ Other \$	Business Miles	Personal Miles	Total Miles					
Check any that apply: Was the vehicle available for personal use during business hours? Do you have another vehicle available for personal use? Do you have written documentation to support these expenses? Business Use of Home Are you claiming use of a home office?				Repairs \$				
Do you have another vehicle available for personal use? Do you have written documentation to support these expenses? Business Use of Home Are you claiming use of a home office?	Check any that a	pply:						
Do you have written documentation to support these expenses? Business Use of Home Are you claiming use of a home office?	Was the vehi	cle available for p	ersonal use dur	ing business ho	urs?			
Business Use of Home Are you claiming use of a home office?	Do you have	another vehicle av	vailable for pers	sonal use?				
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Rent (not mortgage) \$ Garbage \$ HOA Dues \$								
						Dues ¢		
TANGER DESCRIPTION TO THE PROPERTY OF THE PROP								
Water \$ Cleaning \$ Repair/Maintenance \$								

If you do NOT use QuickBooks, please continue to the next page.

If you use QuickBooks, you do not need to continue to the next page. Instead, send an invite to sam@westridgetaxes.com to access your reports. If its QuickBooks Desktop, upload a portable company back up file and provide version along with the username and password.

Income

Total Income (Gross Receipts/Sales) \$ Other Income \$	
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Cost of Goods Sold

Products Purchased \$	Beginning Inventory \$
Materials & Supplies \$	Ending Inventory \$
Contract Labor \$	

Expenses (Please attach a list of any other expenses not listed)

Accounting	\$ Malpractice Insurance	\$
Advertising	\$ Disability Insurance	\$
Bank Charges	\$ Errors & Omissions Ins.	\$
Business Gifts	\$ Owners Medical Ins.	\$
Business License	\$ Interest	\$
Continued Education	\$ Internet	\$
Delivery & Freight	\$ Janitorial	\$
Dues & Subscriptions	\$ Job Materials	\$
Employee Benefits	\$ Laundry & Cleaning	\$
Equipment Rental	\$ Legal & Professional	\$
Incentives & Rewards	\$ Meals	\$
Liability Insurance	\$ Merchant Fees	\$
Outside Services	\$ Office Expense	\$
Payroll Taxes	\$ Parking & Tolls	\$
Officer Gross Wages	\$ Pension & Profit Sharing	\$
Product Purchases	\$ Employee Gross Wages	\$
Printing	\$ Postage	\$
Repairs	\$ Rent for Commercial	\$
	Space (not home office)	
Sales/Presentations	\$ Storage	\$
Small Tolls	\$ Security	\$
Telephone	\$ Supplies	\$
Uniforms	\$ Travel	\$
Workers Comp	\$ Utilities	\$

Did you purchase any new assets over \$500? If so, please provide us with the purchase date, description, and purchase price or purchase agreement.