



**SOLE PROPRIETORSHIP TAX ORGANIZER (Schedule C)**

Business Name _____	Tax Period _____
Address _____	Federal ID# _____
_____	State ID# _____

Provide a general ledger, trial balance, depreciation schedules, balance sheet, and profit and loss statement by activity. In addition, provide the following information:

	<u>DONE</u>	<u>N/A</u>
1. Copies of correspondence with tax authorities regarding changes to prior year(s) returns.	___	___
2. Copies of all deferred compensation plans and agreements.	___	___
3. Copies of all federal and state payroll reports including Forms W-2/W-3, 940, 941.	___	___
4. Copies of Forms 1099/1096, 5500, 1042, 5471, 5472, 8865, 8858, 8886 that have been <u>filed</u> .	___	___
5. Copies of Forms 1099, 5471, 5472, 8865, 8858, 8886 and Schedules K-1 that have been <u>received</u> .	___	___
6. List of all entries in prepaid, accrued, and income tax expense accounts, including dates and amounts of all federal, state and local income tax payments and refunds.	___	___
7. Schedule of all interest and dividend income, not included on Forms 1099.	___	___
8. Schedule of assets acquired and/or sold during the year including date acquired, date sold, sales or purchase price, including any trade-in allowance. Include Form HUD-1 for real estate transactions.	___	___
9. Copy of the inventory uniform capitalization computation.	___	___
10. Detail of any lobbying expenses.	___	___
11. Schedule of any club dues paid.	___	___
12. List of potential non-deductible expenses such as penalties and life insurance premiums.	___	___
13. Vehicle and mileage data for company-owned passenger vehicles.	___	___
14. Information to compute the domestic production activities.	___	___
15. List of all entries in miscellaneous income/expense accounts.	___	___
16. Separate detail of meal and entertainment expenses (entertainment no longer deductible).	___	___
17. List of each type of trade business activity or rental activity, indicating the date started or acquired.	___	___
18. List of activities conducted in other states, including gross receipts, property, payroll and rents by state.	___	___