

TAX ORGANIZER – BUSINESS ENTITIES

YOUR TAX APPOINTMENT

Please complete and sign this organizer prior to your appointment.

Please call to schedule your appointment. It is best to call early before the calendar becomes full.

Please mail the completed organizer along with the requested information to our offices prior to February 7, 2020.

Indicate Desired Appointment Date

Date: _____

Time: _____

Please notify this office promptly if you are unable to keep this appointment.

Referrals are Always Appreciated.

If you know someone who would like a tax appointment, please have them call this office. Do not be concerned that your business, personal or financial matters will be discussed with clients whom you refer. All client information is treated in the utmost confidence.

A1 - ENTITY INFORMATION

Returning entities enter name of business and skip entries except for changes.

Name of Business -				Employer ID Number (EIN)	
Address					
Contact Individual				Phone	
E-mail					
Check One:	<input checked="" type="checkbox"/> Corporation Limited Liability Company	<input type="checkbox"/> S-Corporation Limited Liability Partnership	<input type="checkbox"/> General Partnership	<input type="checkbox"/> Limited Partnership	
Principal Business Activity				Date Business Started	
Principal Product or Service				Business Code	
Method of Accounting (Check One)	<input checked="" type="checkbox"/> Cash	<input type="checkbox"/> Accrual	<input type="checkbox"/> Other (Describe):		

A2 Please sign that enclosed information is true & correct - Signature Required

All information is true and correct to the best of my knowledge

DECLARATION :

I have engaged Boyer & Boyer to prepare my business entity return(s). I have provided the information requested, where applicable, by this form to the best of my knowledge and hereby declare it is complete and ready for the preparation of my/our income tax returns. Where business deductions shown, I acknowledge having spent these amounts and have kept a log or diary of such activities, pursuant to section 274(a) and can fully substantiate such deductions.

Signature _____

Date _____

Boyer & Boyer, Certified Public Accountants
boycpa@comcast.net

2392 Limestone Road
Wilmington, Delaware 19808
(302) 998-3700

2496 North DuPont Parkway
Middletown, Delaware 19709
(302) 464-1300

Dear Client:

Your calendar year LLC or Partnership tax return is due March 15, 2020. So you can meet this deadline we will need the following information in our offices **no later than February 7, 2020:**

Complete bank statements for ALL bank accounts for the entire year.

All business credit card statements for the entire year.

All lines of credit, commercial loan, and capital lease statements for the entire year. (Year- end loan statements)

Computer program backup media or Safeguard sheets or check stubs, depending on your method of bookkeeping. You may also upload your digital accounting records to SHAREFILE. Our Accountants will send you an invitation via email to securely upload a backup file into our Cloud Portal. Scanned documents, such as bank and credit card statements can also be uploaded into Sharefile. Please contact our firm with any questions.

Breakdown of deposits that are non-income based. (Such as loans or funds contributed by LLC Members)

List of all assets acquired, disposed of or traded in during the year.

Copies of all sales contracts and loan agreements for the year.

Accurate balances of Accounts Receivable, Inventory and Accounts Payable as of 12/31 if applicable.

Copies of the declarations sheet for all insurance policies for the year.

All payroll information and year to date payroll reports if not prepared by our firm.

Subcontract Labor Forms 1099 and 1096

Statements on all investments for the year.

Mileage Log to substantiate business use of vehicles.

Should you have any questions in preparing this information, please contact the business entity department.

Sincerely,

Elizabeth L. Boyer, CPA
Managing Partner
Business Entity Leader

Boyer & Boyer, Certified Public Accountants
hoyercpa@comcast.net

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