

2026 Tax Compliance Experts LLC!- Business Income & Expense Organizer

We're so excited to begin our partnership with you! To ensure we have the information we need to best serve you and your small business tax needs, please take a few moments to complete the information below. If you have any questions, please feel free to contact us via email at: taxcomplianceexperts@gmail.com

Taxpayer Name

First | MI | Last | Suffix

Date of Birth

Identification Card

Upload

or drag files here.

Social Security Number

Social Security Card

Upload

or drag files here.

Phone

Email

Business Information

Business Legal Name

Employer Identification Number (EIN)

If you do not have an EIN, leave this blank. Do not enter your social security number

If you do not have an EIN for your business, would you like us to assist you with applying for an EIN?

Business Website

Business Address

Address Line 1

Address Line 2

City

State

Zip Code

Type of Business or Purpose of Business

What entity was your business formed?

Business formation date

Did you materially participate in this business in 2026?

Yes No

Did you pay Estimated Taxes related to this business?

Yes No

Do you have (W-2) Employees?

Yes No

Do you have Independent Contractors?

Yes No

Which accounting method do you use?

Is this the first time you will file taxes for this business?

Yes No

Do you use a portion of your home for business?

Yes No

Will you depreciate any business assets?

Yes No

BUSINESS INCOME

Total Gross Receipts

This is the total of all monies received (sales) from your business activities. This does not include any money received from business loans, investors (including you, the owner), or the sale of fixed assets (like old equipment). It does include 1099-MISC income. NOTE: Do not count sales tax you collected and paid to the state as income or expense.

Total Other Business Income

Please select which forms and/or documents you can provide to show proof of business income earned during the tax year.

- [ ] 1099-MISC
- [ ] 1099-K
- [ ] Bank Statements
- [ ] Third Party Payment Processor Statements (Cash App, PayPal, Stripe, etc)
- [ ] Profit & Loss Statement
- [ ] Receipt Book
- [ ] Self-prepared statement of income received
- [ ] Other

Do you track inventory?

- ○ Yes
- ◉ No

Total Cost of Goods Sold

This is includes: 1. Purchases of inventory 2. Purchases of materials, parts, ingredients, or other supplies directly used in producing or procuring yourproduct; and 3. Packaging or shipping expenses, when not paid by customers or accounted for elsewhere. The value of any year-end inventory will be subtracted from the costs you paid out over the year; if you had inventory left at year end, list that amount.

BUSINESS EXPENSES

To be deductible, a business expense must be both ordinary and necessary. An ordinary expense is one that is common and accepted in your field of business. A necessary expense is one that is helpful and appropriate for your business. An expense does not have to be indispensable to be considered necessary.

To file with **TAX COMPLIANCE EXPERTS LLC**, you need to bring a breakdown of your deductible business expenses subtotaled by category. ***If you have a collection of receipts to organize and/or bank and credit accounts to reconcile, we can assist with these activities, however these activities are not part of tax preparation and are considered bookkeeping. Bookkeeping fees are charged in addition to tax preparation services.

Advertising

Contract Labor

Commission and fees

Depletion

Employee benefit programs

Health Insurance

Insurance (other than health)

Mortgage interest

Other interest

Legal and professional services

Office expenses

Pension and profit sharing

Rent or lease of equipment

Rent or lease of property

Repairs and maintenance

Supplies

Taxes and licenses

Travel

Meals

Utilities

Wages

If you have other business expenses that do not appear to fit in any of the expense categories listed above, please list them below indvidually.

Other Business Expenses

	Expense Description	Expense Amount
⊗		

+ Add Item

CAR & TRUCK EXPENSES

You may deduct car/truck expenses for local or extended business travel, including:

- between one workplace and another,
- to meet clients or customers,
- to visit suppliers or procure materials,
- to attend meetings,
- for other ordinary and necessary managerial or operational tasks or needs of your business.

Note: Driving between your home and your regular workplace is personal commuting and is not deductible. Keep a written record of business mileage. For eligible business travel in 2026, the IRS standard mileage rates are 72.5 cents per mile for January 1-June 30 and 76 cents per mile for July 1-December 31. Report business miles separately for each period below. The standard rate includes gas, repairs, maintenance, depreciation and auto insurance; do not also deduct those costs. Contact our office if you need help calculating mileage.

Date you placed your vehicle in service for business purposes.

Do you or your spouse have another vehicle available for personal use?

- ( ) Yes
- (•) No

Was your vehicle available for personal use during off-duty hours?

- ( ) Yes
- (•) No

Do you have written evidence to support your business vehicle use?

- ( ) Yes
- (•) No

Total Commuting miles

Total Busines miles

Total Other miles

Business miles, January 1-June 30: _____

Business miles, July 1-December 31: _____

Is there anything else you would like to share with us about your business?

ATTESTATION

By signing below you are attesting that the personal and financial information provided to **TAX COMPLIANCE EXPERTS LLC!** is true and accurate. The information listed on the Small Business Income & Expense Organizer is the information that (I/WE) gave to the paid tax preparer to complete the return. I release the tax preparer from any negligence or responsibility pertaining to this return.

I acknowledge that all information provided to **TAX COMPLIANCE EXPERTS LLC!** is true and accurate to the best of my knowledge. I understand that I am required to have any supporting documentation to validate the information provided. Furthermore, I understand that knowingly providing false information on my tax return and reporting it to the IRS, that I am taking part in a potentially criminal penalty situation and is punishable by law including but not limited to: facing court dates, restitution, and possible imprisonment. I waive **TAX COMPLIANCE EXPERTS LLC** and the preparer of any error due to incorrect information provided by me.

Taxpayer Signature *

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Submit my Business Income & Expense Organizer Now!

Save