PRIME TAX ADVISORY LLC

primetaxadvisoryllc.com

Annual summary for your tax preparer

SCHEDULE C | ENGLISH

Fill in annual figures and bring supporting records. Asterisk (*) = detailed online guide.

Client name: _____ Tax year: _____

Business / LLC: _____

Business income

Customer payments — cash, check, card and 1099 income *	
Refunds and returns to customers	
Other business income	
Cost of goods sold (preparer review)	

Business expenses

Advertising & marketing	
Commissions / merchant fees	
Subcontractors / contract labor	
Business insurance (not personal health)	
Business loan interest (NOT loan principal)	
Legal, bookkeeping, tax / professional fees	
Office expenses / postage	
Equipment and vehicle rental / leases	
Business office / commercial rent	
Business repairs and maintenance	
Business supplies / inexpensive tools *	
Business licenses and qualifying business taxes	
Business travel (not commuting) *	
Eligible business meals — FULL COST before tax adjustment *	
Business phone / internet / utilities (business portion)	
Employee wages (if applicable)	
Other ordinary business expenses (describe)	
Additional business expense (describe):	

Only business costs. Do not enter estimated income tax payments as an expense.

Vehicle - facts

Business miles (year total) *	
All miles driven (year total)	
Business parking and tolls paid	
Vehicle running costs paid (gas, repairs, insurance etc.)	
Year of purchase / start of business use (notes)	

Home office - facts

Total home area (sq. ft.) *	
Dedicated office area (sq. ft.)	
Annual home / apartment RENT (if renting) *	
Annual MORTGAGE INTEREST (not principal) *	
Annual home property taxes	
Annual home utilities (electric, heat, water) *	
Annual home / renters insurance	
Annual qualifying home repairs	

Equipment / assets

Equipment item / description:	
Equipment item / description:	
Equipment item / description:	
Equipment item / description:	

Only business costs. Do not enter estimated income tax payments as an expense.