



Nelson Company, P.C. Tax Organizer

Do NOT use estimates and please provide copies of forms
The IRS is more likely to audit if they see a round number (i.e. 0 or 5, seriously)

Name: _____

Business Activity: _____

Before you start entering numbers, please take 2 minutes to read through the entire organizer.

\$ Amount

Income: total received in calendar year (not billed)

Advertising, Marketing & Business Development Costs

\$ Amount

These are costs to promote your business only, not to create a final product for a customer/client

Advertising and Publicity

Business Cards/Collateral/Brochures/Marketing Materials

Business Gifts given for marketing purposes

Photography

Networking Event Fees

Website Design

Signage

Identity Design Fees

Video production

Trade Show Costs

Coaching/Career Counseling

Education & Training

Continuing Professional Education

Website Maintenance/Hosting Fees

Main Business Activity

These are costs to create/develop/produce/design a final product for a customer/client

Beginning Inventory (retail only)

Returns and Personal Use (Retail Only)

Items Purchased for resale purposes (Retail Only)

Ending Inventory (Retail Only)

Supplies and Materials

Small Tools/Equipment (used in main activity)

Contract Labor

Copywriting

Printing

Production

Shipping/Freight

Video Editing

Equipment (if items individually cost over \$1,000 do not list here, but record on page 3)



Nelson Company, P.C. Tax Organizer

Do NOT use estimates and please provide copies of forms
The IRS is more likely to audit if they see a round number (i.e. 0 or 5, seriously)

Running the Business

\$ Amount

Office Rent - if over \$600, did you already send a 1099 form? Mark Y or N	_____	_____
Bank Fees (Monthly Fees/Statement Fees/Wire Fees)		_____
Credit Card Processing Fees		_____
Credit Card Interest Expense (Business credit cards only)		_____
Loan/Line of Credit Interest Expense (Business loan/lines only)		_____
Telephone: Cell Phone	Bus. Use % _____	_____
Telephone: Landline (indicate business use % if shared)	% _____	_____
Internet Fees (if bundled, indicate portion for internet of total bill)	% _____	_____
Business Meals (keep all receipts and detail business purpose)		_____
Postage/Mailing (include PO Box, enter product shipping under Main Business Activity, pg. 1)		_____
Insurance (liability, disability, etc)		_____
Office Supplies/Small Tools/Stationary/Décor/Etc		_____
Legal Fees - if over \$600, did you already send a 1099 form? Mark Y or N:	_____	_____
Other Consultant Fees		_____
Tax Preparation & Consulting Fees		_____
Bookkeeping Fees		_____
Payroll Preparation Fees		_____
Salaries/Wages		_____
Payroll Taxes Paid (include federal & state quarterly payroll tax forms and year end W2s)		_____
Employee Benefits (company paid health insurance, retirement plan match, etc)		_____
Local Taxes Paid (Tri-Met, City of Portland, county personal property, etc)		_____
Contract Labor - if over \$600, did you already send a 1099 form? Mark Y or N:	_____	_____
Research Services/Samples		_____
Professional Memberships/Affiliations/Fees/Dues		_____
Licenses & Certifications (including state registration fees)		_____
Publications & Subscriptions		_____
Storage (offsite/software/backups/etc)		_____
Equipment Rental (copy machines/printers/etc)		_____
Music/Ambience for Office		_____
Water/Refreshments for Office Staff/Guests		_____
Repairs (including equipment/office/painting/locks)		_____
Local Travel Costs (train/bus) For parking and other regular business auto use, see page 4		_____
Travel - Hotels/Fares (do not include meals here, use Business Meals above)		_____
Travel - Rental Car/Fuel		_____
Uniforms/Protective Clothing (must look ridiculous if you were to wear in public)		_____
Office Improvements (If cost is over \$1,000 do not include here, detail on page 3)		_____
Software Licenses (must be renewed each year)		_____
Standalone Software (if items individually cost over \$1,000 do not include here, use page 3)		_____
Office Equipment (if items individually cost over \$1,000 do not include here, use page 3)		_____
Computer Equipment (if items individually cost over \$1,000 do not include here, use page 3)		_____
For Home Office expenses, see page 5		_____

