



Tax Organizer For Your Business

****Please Complete The Tax Organizer As Best As Possible**

****Be Sure To Bring The Last Two Years Tax Returns**

Taxpayer Information

Last Name: _____

First: _____

Occupation: _____

Date of Birth: _____

Social Security: _____

Spouse Information

Last Name: _____

First: _____

Occupation: _____

Date of Birth: _____

Social Security: _____

Dependent Information

Last Name: _____

First: _____

Date of Birth: _____

Last Name: _____

First: _____

Date of Birth: _____

Last Name: _____

First: _____

Date of Birth: _____

Business Contact Information

Business Name: _____

Street Address: _____ City: _____ State: _____ Zip Code: _____

Banking Information

Bank Name: _____

Account Number: _____

Checking or Savings

Routing Number: _____

945 Reservoir Avenue ▪ Cranston, Rhode Island 02910 ▪ www.universalwm.com

Phone - 401.331.7600 | Toll - 877.782.2855 | Fax - 401.331.7800



Business Tax Deduction Checklist

Expenses	Yes	No	N/A	Amount
Advertising				
Auto Expense – mileage, tolls, parking, taxi				
Bad Debts				
Bank fees – loan and interest expense				
Casualty Losses				
Charitable Contributions				
Client gifts				
Computer				
Contract labor				
Dues and Subscriptions				
Education – professional development, seminars, books, tuition				
Insurance – disability, liability, property, workers comp				
Internet Access – cell phone and landline				
Licenses and fees				
Legal and professional – CPA and lawyer				
Meals & Entertainment				
Office Supplies				
Postage and Mailing – Fed Ex/UPS				
Rent				
Repairs and maintenance – parts and labor				

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Expenses	Yes	No	N/A	Amount
Start up expenses – first \$5000 of costs of launching new business				
Taxes - state, property, real estate and employer portion of payroll				
Travel Expense				
Utilities				
Home Office				
Home Office Square Footage				
Home Office Electric				
Home Office Gas				
Home Office Water				
Home Office Repairs				
Home Office TV/Internet/Cable/Phone				
Other				
Other				
Other				
Other				
Other				

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