

Hupp Tax Service

32341 Vine Street, Willowick, OH 44095

Phone (440) 944-4343

Fax (440) 944-4341

WHAT TO BRING – BUSINESS

Tax year **2022**

(or mail, fax, email (taxhelp@hupptax.com), Upload (hupptax.com))

Statement of Income and Expenses
(profit and loss statement)

Balance Sheet (be sure to include year-end bank balances and ending inventory if applicable)

Payroll reports (W3/W2, (941 etc.)

1099's (1099R, 1099MISC, 1099INT, 1099DIV, 1099B, 1099G, 1099C, etc.)

1098's

Anything marked
"Important Tax Document"

Capital contribution and draw amounts by owners/members/shareholders/partners.

Business Name _____

Officers (list new officers below)

No change

President _____

Treasurer _____

Secretary _____

Business Type (S Corp, Partnership, sole proprietor, LLC, Trust, Estate)

Contact information (we will confirm at check in):

Phone # _____

Did the business move? If so, date? _____

New address _____

If you're new to Hupp Tax Service, bring:

❖ Prior two year tax returns (Federal State & City).

❖ List of officers and board members, names and addresses.

Section 1 - All clients please complete.

Retirement Plan contributions (SIMPLE, SEP, solo 401(k), other)

None / Not applicable

Quarterly estimate payments

None / Not applicable

	Date Paid	Federal	State	City
1 st qtr	_____	_____	_____	_____
2 nd qtr	_____	_____	_____	_____
3 rd qtr	_____	_____	_____	_____
4 th qtr	_____	_____	_____	_____
Total	_____	_____	_____	_____

List of furniture/equipment purchased and sold

Item	Cost	Date purchased	Date Sold
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

None / Not applicable

Profit & Loss Statement (example)

Income

Total income _____

If you have Inventory:

Ending Inventory _____

Expenses (We don't need to see your receipts, but you need to keep them for all of your deductions.)

Cost of goods sold / Purchases _____

Wages / Subcontractors _____

Payments to individuals over \$600/year require Form 1099NEC to be filed.

Did / will you file 1099s as required? YES / NO

Advertising _____

Legal & Professional _____

Interest (business loans, credit cards) _____

Rent _____

Office Supplies _____

Repairs/Maintenance _____

Licenses / Dues _____

Meals (IRS require each receipt indicate business purpose)

From a restaurant _____ ***NEW for 2021 and 2022:**

Other food _____ **must specify restaurant vs not**

Travel (other than mileage, see below) _____

Utilities _____

Gifts _____

Education/Seminars _____

Insurance _____

Health Insurance (self-employed) _____

Other _____

Other _____

Other _____

Other _____

Business MILES: _____ (IRS requires a log or record of odometer, date, business purpose for each trip)

TOTAL MILES driven on vehicle for all purposes: _____ Make, model, year of vehicle(s) _____

If you prefer to use actual expenses instead of the per mile rate, please complete below section and we can calculate the deduction based on the business use percentage. REMINDER: Commuting miles are NOT deductible.

Gas _____

Insurance _____

Repairs/Maintenance _____

Auto Loan interest _____

Purchase date and price _____

Car Wash, misc _____