WHAT TO BRING - RUSINESS

2024

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.) No change President Treasurer Secretary Treasurer Secretary Secretar		IAI TO DRING - DOSII				rax year.	20 27
Balance Sheet (be sure to include year-end bank balances and ending inventory if applicable)	(or i	mail, fax, email (<u>taxhelp@hupptax.com</u>	ı), Uplo	oad (hupptax.	com)		
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Profit & Loss Statement (example)

Business Name:	
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.)
Purchases / Cost of goods sold	
Subcontractors / Wages Payments to individuals over \$600/year require F Did / will you file 1099s as required?	Form 1099NEC to be filed. YES / NO
Office Supplies	
Postage	
Seminars / Training & Education	
Phone (if separate business line)	
Rent	
Repairs/Maintenance	
Travel (airfare, hotels, etc.; include mileage below))
Meals (IRS requires receipt indicates names & purp	pose)
Legal & Professional	
Dues / Licenses	
Advertising	
Gifts	
Interest (business loans, credit cards)	
Utilities	
Insurance – indicate type	
Health Insurance (if self-employed)	
Equipment – please list with purchase dates & cos	it
Other	
Other	
	sed for business. rd rate of \$5/sq ft (Simplified) OR Actual expenses. l, include ALL costs for home (Utilities, repairs, insurance, mortgage, etc)
Business MILES: (IRS rec	quires 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)er mile rate, please complete below section and we can calculate the
Gas	Auto Loan interest
Insurance Repairs/Maintenance	Purchase date and price