



TARYLE ACCOUNTING, CPA PLLC
CERTIFIED PUBLIC ACCOUNTANT

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Business Tax Return Organizer

Please complete a separate organizer for each entity requiring a tax return

If this business is being treated as a Sole Proprietorship (this includes Single Member Disregarded LLCs) please do not use this form instead use the Sole Proprietorship organizer.

Your Name _____ Phone _____ Email _____

Name of business entity _____
EIN _____

Type of Business Partnership C Corporation S Corporation LLC*

*If LLC what is the tax treatment Partnership C Corporation S Corporation Not Sure

What is the year end of this business? _____

QuickBooks User Name _____ Password: _____

Did you make any payments in 2011 that would require you to file Form 1099 _____

If yes did you or will you file all required forms _____

Cell Phone Expense

This is another area that the IRS is focusing on. Cell phone expenses must be apportioned for business and personal use. The IRS does not believe that cell phones are used 100% for business unless you have a separate cell phone for each. We must report the personal and business use percentage on the tax return. These percentages should be supported by a written record such as your cell phone bills calls marked as business or personal.

Total Cell Phone Expenses _____

Business % _____ Personal % _____

Car and Truck Expenses

If you used a car or truck in this business please complete the Car and Truck Expense organizer.

Electronic payment of C Corporation Tax Liability (attach copy of void corporate check)

Banks no longer accept 8109 coupons with Federal corporation/payroll tax payments. Payments must be made by an electronic method, such as EFTPS or electronic bank draft.

Please send us a copy of the following:

- Backup of QuickBooks file (Preferred) or printout of Balance Sheet Report, Profit & Loss Report, and General Ledger or detailed transaction report. If not available please contact us.
 Attached Sending N/A
- Copies of Year End bank statement
 Attached Sending N/A
- Copies of Year End credit cards statements
 Attached Sending N/A
- Copies of Year End loan statements
 Attached Sending N/A
- Copies of the following if applicable:
 - Annual Minutes
 - Promissory Notes
 - Copy of Business License
 - Payroll Registers and Quarterly & Annual Federal and State Payroll Reports Attached Sending N/A
- Copies of form 1099s including the new form 1099-K issued to your business
 Attached Sending N/A
- Complete the attached New Assets Acquired Sheet if your business purchased or leased any equipment, furniture, vehicles, fixtures or real estate.
 Attached Sending N/A

BOOKKEEPING NOTE FOR 2012 Beginning in 2012 if you accept credit cards or other types of electronic payments such as from PayPal or EBay we will need to report the amount you received separate from the amount you received in cash, checks or other forms of payment. Please make sure you are keeping you records in such a way that these amounts can be broken out.

Is this the first time for us to prepare this return? YES/NO if yes also send us the following (if not already in our possession)

- Copies of organizational documents including:
 - Articles of Incorporation
 - Initial Minutes
 - Stock Certificates
 - Application for Employer Identification number
 - IRS letter granting Employer Identification number
 - IRS letter accepting 8832 corporation election (if applicable)
 - IRS letter accepting 2553 small business corporation (S corp.) election (if applicable)
- Copies of prior years tax returns (if not already in our possession)
- Depreciation schedule from prior tax preparer

Attached Sending N/A

New Assets Acquired Sheet

Please complete if you have purchased any equipment, furniture, vehicles, fixtures or real estate

Business _____ Your Name _____

Asset Description	Cost	Date	Cost included in expenses above
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
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