

William Coppa, EA

Business Income and Expense Organizer

Name of Business	
Trades as/ DBA	
Primary Business Activity	
E-Mail	
Phone	
Fax	
Type of Entity	Corporation Partnership LLC Sole Proprietor
Type of Corporation	C-Corporation S-Corporation
Date of Incorporation	
Date of Election	

Shareholders, Members or Partners			
Name	SS#	Address	Shares/ %

Business Income	
	\$
	\$
	\$
	\$

Business Expenses	
	\$
	\$
	\$
	\$
Commissions & Fees	

Commissions	\$
Fees	\$

Equipment	Purchase Date	Cost
Item:		\$
		\$
		\$
		\$
		\$
Insurance	Vehicle	\$
	Liability	\$
	Workers Comp	\$
Interest Paid	Mortgage	\$
	Other	\$
Legal & Accounting	Tax Preparation	\$
	Accounting	\$
	Legal	\$
Office Expenses	Postage	\$
	Shipping	\$
	Office Supplies	\$
	Printing & Reproduction	\$
	Association Dues	\$
	Subscriptions	\$
	Other:	\$
Supplies		\$
		\$
		\$
		\$
		\$
Rent	Office	\$
	Storage Unit	\$
	Equipment	\$
	Other:	\$
Maintenance		\$
		\$
		\$
Taxes & Licenses		\$
		\$

		\$
Travel Costs	Air Fare	\$
	Ground Transport	\$
	Hotel	\$
	Parking	\$
	Tolls	\$
Utilities		\$
		\$
Wages	Employee Payroll	\$
	Compensation to Officers	\$
	Casual Labor	\$
	Contractor	\$
		\$
Home Office	Size	\$
	House Cost	\$
	Utilities	\$
	Condo Fees	\$
	Insurance	\$
		\$

Filing Deadlines					
Personal Returns		Corporations & Partnerships		Payroll	
April 15 (Unless noted otherwise under annual office notes)	Personal 1040	March 15	Corp 1120/ 1120S Return Dues	January 31	Deadline for sending out W2's & 1099's 4 th Qtr Payment Due 940s, 941s, VA-5s, VEC
October 15	Extended Personal 1040 (Final Due Date)	March 15	Partnership 1065 Return Due (or File Extension)	April 30	1 st Qtr Payment Due 940s, 941s, VA-5s, VEC
		July 31	550 Return Due (Pension Plans)	July 31	2 nd Qtr Payment Due 940s, 941s, VA-5s, VEC
		September 15	Corp. Extended 1120 or 1120S Return Due (Final Due Date)	October 31	3 rd Qtr Payment Due 940s, 941s, VA-5s, VEC
			Partnership Extended 1065 Return 1065 Return Due (Final Due Date)		

Privacy Policy

We value our clients and their privacy is important to us. Therefore, we have adopted the following privacy policy to demonstrate our commitment to the protections of their privacy. We collect nonpublic information about our clients from various sources, including the following:

- Information we received from interviews regarding clients' tax situations
- Information we receive from applications, organizers, or by other means, such as client names, addresses, phone numbers, social security numbers, banking details, dependent information, income, and other tax-related data.
- Information from tax-related documents we require from clients in order to complete their tax returns.

We do not disclose any nonpublic information about our clients or former clients to anyone unless requested to do so by our clients or required by law. We restrict access to nonpublic public information concerning our clients except to employees who need access to such information in order to provide products or services. We maintain physical, electronic, and procedural safeguards that comply with federal regulations to guard all nonpublic personal information. For further information about our privacy policy, please contact us.

2022/2023 Annual Office Notes:

- Work will begin only once ALL documents have been submitted to the office.
- Documents may be provided in-person, by mail, or digitally using Sharefile. Please do not email, text, fax your documents, or link to any other platform.
- If you do not have a ShareFile account, please email the office, w.coppa@comcast.net, requesting a link and provide full names and email addresses for whoever you'd like to have access to your file (spouse, bookkeepers, finance managers, etc)
 - Scanned or original PDF's only. If you do not have a scanner please use a scanner app, pictures will not be accepted.
- DEADLINES
 - Business – March 15th, 2023
 - All paperwork must be provided to our office by March 1st to avoid an extension.
 - Personal Returns – April 18th, 2023
 - All paperwork must be provided to our office by March 1st to avoid an extension.
 - Please note an extension does not extend your deadline to pay only to file.