

# William J. Coppa, EA

## Income Tax Organizer

### Business Income Taxes

## BUSINESS INFORMATION

PLEASE PRINT CLEARLY

<b>Name of Business:</b>	
<b>Trades as (DBA):</b>	
<b>Address:</b>	
<b>Phone #:</b>	<b>Fax #:</b>
<b>E-mail Address:</b>	
<b>Type of Entity (Please circle one)</b>	Corporation   Partnership   LLC   Sole Proprietor
<b>Type of Corporation (If applicable, please circle one)</b>	C-Corporation   S-Corporation
<b>Date of Incorporation:</b>	<b>Election Date:</b>

### SHAREHOLDERS, MEMBERS or PARTNERS

NAME	SOCIAL SECURITY #	ADDRESS	SHARES or % OWNED

### BUSINESS INCOME:

1.	\$
2.	\$
3.	\$
4.	\$

**BUSINESS EXPENSES****Advertising**

\$

\$

\$

**COMMISSIONS and FEES**

\$

**EQUIPMENT****New or Used/Purchase Date****Cost**

1.

\$

2.

\$

3.

\$

4.

\$

5.

\$

**INSURANCE****Vehicle**

\$

**Liability**

\$

**Workers Comp**

\$

**INTEREST PAID****Mortgage**

\$

**Other**

\$

**LEGAL and ACCOUNTING****Tax Preparation**

\$

**Accounting**

\$

**Legal**

\$

**OFFICE EXPENSES****Postage**

\$

**Shipping**

\$

**Office Supplies**

\$

**Printing and Reproduction**

\$

**Association Dues**

\$

**Subscriptions**

\$

\$

**SUPPLIES**

\$

\$

\$

\$

<b>RENT</b>	<b>Office</b>	\$
	<b>Storage Unit</b>	\$
	<b>Equipment</b>	\$
		\$
<b>MAINTENANCE</b>		\$
		\$
<b>TAXES and LICENSES</b>		\$
		\$
<b>TRAVEL COSTS</b>	<b>Air Fare</b>	\$
	<b>Ground Transportation</b>	\$
	<b>Hotel</b>	\$
	<b>Parking</b>	\$
	<b>Tolls</b>	\$
<b>UTILITIES</b>		\$
		\$
<b>WAGES</b>	<b>Employee Payroll</b>	\$
	<b>Compensation to Officers</b>	\$
	<b>Casual Labor</b>	\$
	<b>Contract Labor</b>	\$
		\$
<b>HOME OFFICE</b>	<b>Size</b>	
	<b>House Cost</b>	\$
	<b>Utilities</b>	\$
	<b>Condo Fees</b>	\$
	<b>Insurance</b>	\$

## FILING DEADLINES

Personal Returns		Corporations and Partnerships		Payroll	
April 15	Personal 1040 Returns Due (or file extension)	March 15	Corp 1120 or 1120S Return Due (or file extension)	January 31	Deadline for sending out W2s and 1099s (for previous year's employees)
October 15	Extended Personal 1040 Returns Due (Final Due Date)	April 15	Partnership 1065 Return Due (or file extension)		4 <sup>th</sup> Quarter Payment Due 940s,941s,VA-5s, VEC (for previous year)
		July 31	5500 Return Due (Pension Plans)	April 30	1 <sup>st</sup> Quarter Payment Due 940s,941s,VA-5s, VEC (for current year)
		September 15	Corporation Extended 1120 or 1120S Return Due (Final Due Date)	July 31	2 <sup>nd</sup> Quarter Payment Due 940s,941s,VA-5s, VEC (for current year)
			Partnership Extended 1065 Return Due (Final Due Date)	October 31	3 <sup>rd</sup> Quarter Payment Due 940s,941s,VA-5s, VEC (for current year)

## 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 protection of their privacy.

We collect nonpublic information about our clients from various sources, including the following:

- Information we receive from interviews regarding clients' tax situations
- Information we receive on applications, organizers, or by other means, such as client names, addresses, telephone numbers, Social Security numbers, bank routing and account numbers, dependent information, income, and other tax-related data
- Information from tax-related documents we require from clients in order to complete their tax returns, i.e. Forms W-2, 1099-R, 1099-INT, 1-99-DIV, 1099-MISC, and stock transactions

We do not disclose any nonpublic personal 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 personal 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 questions about our privacy policy, please contact us.