

# Business Data Sheet

Business Name:

EIN#

How is your business structured? (Partnership, S-Corp LLC etc.)

Tell us how to access your accounting records by checking the appropriate solution below:

QuickBooks Desktop backup enclosed. (Username: \_\_\_\_\_ Password: \_\_\_\_\_)

QuickBooks Online. (Username: \_\_\_\_\_ Password: \_\_\_\_\_)

Other (records are enclosed)

Please provide following as of 12/31/18:


Cash: Checking account(s)    \_   
      *(Reconciled balance)*   
      Savings account(s)     \_   
      *(Reconciled balance)*   
      Cash on hand


B. Ending inventory (at cost)

C. Accounts payable total

D. Accounts receivable total

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Customer advanced deposit(s)   
and/or unredeemable gift cards

E. Information on credit cards and loans for business & mortgages (required)

Name of creditor	Loan balance	Interest paid/year

G. Did you purchase anything through the business that was for personal use?      YES    NO

H. Vehicle information

	Vehicle 1	Vehicle 2	Vehicle 3
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Year and make

Total miles for the year

Business miles for the year

Commuting miles for the year

I. Do you have evidence to support the business miles?      YES      NO  
 J. Is the evidence for business mile written evidence?      YES      NO  
 K. Do you have another vehicle available for personal use?      YES      NO

L. Insurance paid for shareholder/partner or proprietor:

*\*Note: If your business is an S-corporation, we will need the health insurance amount for your W-2 preparation.*

Provider insurance amount	Health insurance amount	Life insurance amount	Disability
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M. Do you provide service(s) or deliver product(s) in states other than Pennsylvania?      YES  
 NO

- N. Did you acquire any new assets or equipment greater than \$2,500? YES  
NO
- O. Did you make any payments in 2018 that would require you to file Form(s) 1099? YES  
NO  
If yes, did you file or will you file all required Form(s) 1099? YES  
NO
- P. Please provide us with all Form(s) 1099-K received
- Q. Did you purchase health insurance for your employees? YES  
NO

To the best of my knowledge, the above information is true and correct.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Title: \_\_\_\_\_

**DID YOU KNOW? FILING DEADLINE FOR FORMS 1099**

The deadline for filing forms 1099 with the IRS and providing the forms to contractors is **January 31, 2019**.