



**Loid Tax & Accounting, LLC**

www.loidcpa.com  
Email: todd@loidcpa.com  
Office: 941-358-8275  
Mobile: 941-928-8285

Taxpayer: \_\_\_\_\_

Company Name: \_\_\_\_\_ FEIN: \_\_\_\_\_

Address of Business:

Street 1 \_\_\_\_\_

Street 2 \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Did you materially participate in business?  Y  N

Did you make any payments in 2023 that would require you to file Form(s) 1099?  Y  N

If yes, Did you or will you file required Form(s) 1099?  Y  N

Did you have a home office?  Y  N

Did you use a personal car for business purposes?  Y  N

If yes, Description of Vehicle \_\_\_\_\_

Personal Miles: \_\_\_\_\_

Business Miles: \_\_\_\_\_

Note: The IRS requires a log be kept of all business miles, date, description of where you went and whom you met, plus the miles.

Please complete page 2 with all the revenue and expenses related to the business.

**Signature(s)**

I/We believe that the information disclosed in this organizer to be complete & accurate. I /We understand that incorrect or incomplete information may result in an erroneous return.

Sign form by typing your name in the block provided.

Signature 1: \_\_\_\_\_ Date 1: \_\_\_\_\_

Signature 2: \_\_\_\_\_ Date 2: \_\_\_\_\_

**Income and Expenses (enter whole dollar amounts):**

<p>Sales _____</p> <p>Beginning Inventory _____</p> <p>Purchases _____</p> <p>Ending Inventory _____</p> <p>Advertising _____</p> <p>Auto – Repairs/Gas/License _____</p> <p>Commissions and fees _____</p> <p>Contract Labor _____</p> <p>Employee Benefit _____</p> <p>Insurance _____</p> <p>Interest _____</p> <p>Legal &amp; Professional _____</p> <p>Office Expense _____</p> <p>Pension and profit sharing _____</p> <p>Rent – vehicles, equip _____</p> <p>Rent – other _____</p> <p>Repairs and Maint _____</p> <p>Supplies _____</p> <p>Taxes &amp; Licenses _____</p>	<p>Travel _____</p> <p>Meals _____</p> <p>Utilities _____</p> <p>Wages _____</p> <p>Payroll Tax _____</p> <p>Computer _____</p> <p>Mobile Phone _____</p> <p><b>Other</b></p> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 70%;">Description</th> <th style="width: 30%;">Amount</th> </tr> </thead> <tbody> <tr><td>_____</td><td>_____</td></tr> <tr><td>_____</td><td>_____</td></tr> <tr><td>_____</td><td>_____</td></tr> <tr><td>_____</td><td>_____</td></tr> <tr><td>_____</td><td>_____</td></tr> </tbody> </table> <p><b>Fixed Assets Added:</b></p> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 70%;">Description</th> <th style="width: 30%;">Amount</th> </tr> </thead> <tbody> <tr><td>_____</td><td>_____</td></tr> <tr><td>_____</td><td>_____</td></tr> <tr><td>_____</td><td>_____</td></tr> <tr><td>_____</td><td>_____</td></tr> </tbody> </table>	Description	Amount	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	Description	Amount	_____	_____	_____	_____	_____	_____	_____	_____
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