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2025 Sole Prop/Single Member LLC

Please complete this form to report business income and expenses. Additional forms can be printed from our website at: www.churchwelltax.com/resources

You may provide a complete Profit & Loss, Balance Sheet with Prior Year Comparison, and Complete General Ledger in lieu of completing sections 2 & 4

1. Business Information

Business Details

Owner Name
Phone Number
Email Address
Business Name
Business Address
Business EIN
Type of Business: <input type="checkbox"/> Sole Proprietor <input type="checkbox"/> Single Member LLC
What does the business do?

2. Income & CoGS

A. Income

Sales or Receipts
Other Income
Returns (Reduces Income)

B. Cost of Goods Sold

Beginning Inventory
Ending Inventory
Purchases
Direct Labor*
Material & Supplies*

*Do not enter amounts in both Cost of Goods Sold and Section 4 (Expenses)

4. Expenses

A. Expenses

Advertising	
Auto	----- Complete section 6 -----
Commissions & Fees	
Contract Labor	
Employee Health Ins.	
Self Employed Health Ins.	
Insurance (Not Health)	
Interest (Non-mortgage)	
Accountant & Legal	
Training & Seminars	
Outside Services	
Dues & Publications	
Office Supplies & Expenses	
Postage & Shipping	
Equipment Rent/Lease	
Property Rent/Lease	
Repairs & Maint.	
Supplies	
Taxes & License	
Meals	
Entertainment	
Airfare, Train, Etc.	
Lodging	
Auto Rental, Bus, Taxi, Etc.	
Out of Town Laundry	
Utilities	
Employee Wages	
Other (Specify):	

3. Depreciable Assets

On a separate sheet, please provide a list of all business assets.

Please include:

- **Assets acquired during this tax year.**
Indicate date acquired, amount paid, and any trade-in.
- **Assets disposed of in this tax year.**
Indicate any gain or loss on the asset sale, or if asset was "junked."
- **Prior Depreciation.**
For new clients, please provide the depreciation report from your last year's tax return, including detailed asset list and asset life history.

5. Vehicle Expense

Vehicle 1

Vehicle Make/Model/Year		
Date Purchased		
Beginning/Ending Mileage for Year	/	
Total Miles (Including Personal)		
Commute Miles		
On-the-Job Miles		
Is the vehicle leased?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Do you have written records to support use?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Was another vehicle available for personal use?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Cost of Fuel, Repairs & Maintenance		
Cost of Insurance, License & Fees		

Vehicle 2

Vehicle Make/Model/Year		
Date Purchased		
Beginning/Ending Mileage for Year	/	
Total Miles (Including Personal)		
Commute Miles		
On-the-Job Miles		
Is the vehicle leased?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Do you have written records to support use?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Was another vehicle available for personal use?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Cost of Fuel, Repairs & Maintenance		
Cost of Insurance, License & Fees		

Vehicle 3

Vehicle Make/Model/Year		
Date Purchased		
Beginning/Ending Mileage for Year	/	
Total Miles (Including Personal)		
Commute Miles		
On-the-Job Miles		
Is the vehicle leased?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Do you have written records to support use?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Was another vehicle available for personal use?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Cost of Fuel, Repairs & Maintenance		
Cost of Insurance, License & Fees		

6. Business Use of Home

To qualify, an "office in the home" must be used exclusively and on a regular basis (a) as your principal place of business, or (b) by patients, clients, or customers in meeting and dealing with you in a normal course of business. A home office will qualify as your principal place of business if: 1) You use it exclusively and regularly for the administrative or management activities of your trade or business, and 2) You have no other fixed location where you conduct substantial administrative or management activities of your trade or business. If you are an employee, the home office use must also be for the convenience of the employer. Enter 100% of home taxes and mortgage interest under Itemized Deductions on the Tax Organizer for individuals, Sections 7B&C.

A. Area of Home

Total Square Footage of Home

Square Footage of Area used for Business

B. Home Office Expenses

	\$ Amount	Expense applies to:
Insurance	<input type="checkbox"/> Entire Home	<input type="checkbox"/> Office Only
Rent	<input type="checkbox"/> Entire Home	<input type="checkbox"/> Office Only
Repairs & Maint.	<input type="checkbox"/> Entire Home	<input type="checkbox"/> Office Only
Utilities	<input type="checkbox"/> Entire Home	<input type="checkbox"/> Office Only
Other (Specify):	<input type="checkbox"/> Entire Home	<input type="checkbox"/> Office Only
Other (Specify):	<input type="checkbox"/> Entire Home	<input type="checkbox"/> Office Only

7. Additional Requirements

Please provide copies of the following documents if applicable:

- Balance Sheet for tax year
- Profit & Loss for tax year
- Forms 1099 issued
- Forms W-2 issued
- Payroll Forms 941 for each of the four quarters of the tax year
- Forms 1099 received
- Any notices received from Tax Agencies for the tax year

Please attach an additional sheet with any Questions, Comments, or Notes.

8. Signature

We will complete your return based on the information provided. We will not be able to complete returns where we have reasonable suspicion that the information provided is intentionally incomplete or inaccurate.

If you are having problems providing accurate financial statements, bookkeeping services are available for an additional fee.

To the best of my knowledge, all of the information contained within this document is true, correct, and complete.

Representative:

Title:

Date: