

Partnerships Tax Organizer

Partnership Name: _____

EIN # _____ Date Incorporated : _____

What is the principal business activity of the Partnership? _____

Mailing Address: _____

Contact Name: _____

Contact Phone # _____ email: _____

Contact Mailing Address _____

Partner Information

First Name-Last Name <small>(Enter information for all partners who owned shares at any time during the year)</small>	Social Security Number	Partner Mailing address	% owned at start of year	% owned at the end of the year	Date of ownership changes (if any)

Income

What were the gross receipts or sales for the year? _____

What portion of gross sales listed above was refunded or returned? _____

Cost of Goods Sold (COGS)

associated with manufacturing a product or purchasing a product for resale.

Opening inventory on the first day of the year? _____

Purchases of products and inventory for resale? _____

Materials and supplies used in manufacture or sales production? _____

Cost of labor related to sale or production of goods held for sale? _____

Other costs of goods not listed above (you can list these on separate detail worksheet) _____

Closing inventory at end of year? _____

Business Expenses

Advertising: _____		Rent (<i>office, leasehold, storage</i>) _____
Continuing Education: _____		Rent or lease (<i>Equip or Vehicles</i>) _____
Business Bank Fees: _____		Credit Card Processing Fees: _____
Business Licenses & Permits _____		Business Insurance: _____
Cell Phone expenses (100% of cost) _____	What % of business use?: _____	
Internet connection _____		Fax Service: _____
Travel expenses: _____		Utilities _____
Field Related Dues & Subscriptions: _____		Postage/PO Box: _____
Meals: _____		Office Supplies: _____
Total Employee Wages _____		Taxes - Payroll (941, 940 & State) _____
<i>(W2's issued to Employees)</i>		<i>(1099-MISC to unincorporated payees required)</i>

Sales of stock, real estate or other property

*Please attach copies of year-end brokerage statements relating to stock sales.
If real estate was sold during the year, provide copies of closing papers.*

For NEW clients: Please upload or attach last years Partnership tax return and any important info.