



Business Income Tax Checklist

CONTACT INFORMATION: New clients, fill out completely. Returning clients, fill out for changes.

Name of Business:	_____	Contact Name:	_____
EIN (if applicable):	_____	Contact Phone #:	_____
Business Address:	_____	City	_____
State	_____	Nature of Business	_____
Contact Email:	_____		
Clients New to VDTA:	<input type="checkbox"/>	Copy of Valid Driver's License and Social Security Card (if applicable to the business)	
	<input type="checkbox"/>	Prior 3 Years' Tax Returns (at minimum, 1 year)	
	<input type="checkbox"/>	Any Depreciation Detail from Prior Years' Tax Returns	

BUSINESS INCOME

All Income Received by the Business, Including 1099s

BUSINESS EXPENSES

- | | | |
|---|--|--|
| <input type="checkbox"/> Advertising Expenses | <input type="checkbox"/> Legal & Professional Fees | <input type="checkbox"/> Travel Expenses |
| <input type="checkbox"/> Contract Labor | <input type="checkbox"/> Repairs/Maintenance | <input type="checkbox"/> Rent |
| <input type="checkbox"/> Insurance Expense | <input type="checkbox"/> Utilities | <input type="checkbox"/> Meals |

Vehicle & Travel Usage Deduction

- Vehicle Description: Year, Model & Make of the vehicle used for business purposes
- Approximate Date vehicle began being used for business purposes
- Mileage: Total vehicle miles for the year, miles used for business purposes & commuting miles to & from work location
- Overnight Travel Away from Home: Including destination, dates spent at each location visited, business purpose, # of non-business days spent & other business travel expenses such as airfare, lodging or meals

Office in Home Deduction

- In order to deduct a portion of space within your home as a business expense, the space must be used solely for business purposes 100% of the time and your home address must be the primary operating address of your business. Include the total square footage of your home and the square footage of the space used for the OIH deduction.

BUSINESS ASSETS

- Please include any invoices for assets purchased by the business within the tax year. An asset is defined as an item that was purchased for the business that will last more than one year and cost over \$100.

MISCELLANEOUS INFORMATION:

- Identity Protection PIN
- # of Days Physically Worked in a Taxable City (such as Grand Rapids, Walker, Muskegon, Big Rapids, Lansing, East Lansing, Flint or Detroit)

If you have questions, please visit our website, send us an email, or give us a call!
www.vdtapro.com info@vdtapro.com (616) 840-6352