



DP FINANCIAL & TAX, INC.

4775 E 91ST ST S, STE 200, TULSA, OK 74137
PHONE: 918.392.7879 | FAX: 918.392.7079

BUSINESS ORGANIZER

GENERAL INFORMATION		
Company		EIN
Principal Business or profession		
Business Address	City	Zip
Business Email	Business Phone Number	

Entity Type <i>(Circle one)</i>	Sole Proprietor	S Corp	Partnership
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Was there an ownership change?	Yes / No
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OWNER INFORMATION		
Shareholder/Partner Name	SSN	Percent Owned
Address	City	Zip
Email	Phone Number	

Shareholder/Partner Name	SSN	Percent Owned
Address	City	Zip
Email	Phone Number	

Shareholder/Partner Name	SSN	Percent Owned
Address	City	Zip
Email	Phone Number	

BUSINESS INCOME		
	<i>Amount</i>	<i>Notes</i>
Reported on Form(s) 1099		
Other Income		
Other Income		

BUSINESS EXPENSES			
	<i>Amount</i>		<i>Amount</i>
Compensation of Officers (W-2)		De Minimis Supplies/Repairs	
Employee Salaries and Wages (W-2)		Equipment Rent	
Repairs and Maintenance		<i>Insurance</i>	
Bad Debts		Officer Health Insurance	
Rent		Employee Health Insurance	
State Franchise or Income Taxes/Fees		Liability	
<i>Payroll Taxes</i>		Internet/ Website	
SS		Janitorial	
MED		Laundry and Cleaning	
FUTA		Legal and Professional	
SUI		Meals	
Other Taxes		Entertainment	
Licenses		Office Expense	
Interest		<i>Outside Sevices/Contractors</i>	
Advertising		1099s issued?	Y / N
SEP/401(k)/Solo 401(k)/SIMPLE Cont		Payroll Processing Fees	
Accounting		Parking Fees and Tolls	
Automobile/Truck Expense		Permits and Fees	
Bank Charges		Postage	
Charitable Contributions		Printing	
Cleaning		Security	
Client Gifts (\$25 max per client)		Supplies	
Commissions		Telephone	
Computer Services and Supplies		Tools	
Credit and Collection Costs		Training/Continuing Education	
Delivery and Freight		Travel	
Discounts		Uniforms	
Dues and Subscriptions		Utilities	
De Minimis Supplies/Repairs		Other:	
Equipment Rent		Other:	

ACCOUNT BALANCES			
Include Bank Accounts (traditional, Paypal, Venmo, Cashapp, etc.), Virtual Currency, Credit Cards, Loans, etc.			
<i>Account</i>	<i>Ending Balance</i>	<i>Account</i>	<i>Ending Balance</i>

COST OF GOODS SOLD		
	<i>Amount</i>	<i>Notes</i>
Inventory at Beginning of Year		
Purchases		
Cost of Labor		
Inventory at End of Year		

BUSINESS MILEAGE			
<i>Vehicle</i>	<i>Date in Service</i>	<i>Total Mileage</i>	<i>Business</i>

ASSET PURCHASES			
<i>Asset</i>	<i>Date Purchased</i>	<i>Amount</i>	<i>Condition</i>

ASSET DISPOSALS			
<i>Asset</i>	<i>Date Sold</i>	<i>Amount</i>	<i>Exchange/Trade?</i>

HOME OFFICE (EXCLUSIVE USE ONLY)			
Home Square Footage		Office/Storage Square Footage	