

Compliments of:



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Offering Tax Efficient Financial Planning^{SM*}

BUSINESS INCOME/EXPENSES

Name of Proprietor _____ Business Activity _____

Business Name _____ Date Business Began _____

Business Structure Sole Proprietorship Single Member LLC Partnership or Multi-Member LLC
 S Corporation C Corporation

Business is conducted on Cash Basis Accrual Hybrid (explain)

YES NO

- Do you use any part of your home exclusively and regularly for business? If yes, square footage of home and square footage of home office is needed. Daycare providers have additional requirements.
- Did you hire any new employees that may qualify for job credits?
- Do you have a company pension plan such as a SEP, SIMPLE, or 401k?
- Did you buy or sell any assets? If yes, complete capital asset worksheet.

INCOME	COST OF GOODS
Gross Receipts/Sales	Inventory 1/1/09
Commissions	Purchases Made During Year
Returns & Allowances	Merchandise Returned to Vendor
Other Income	Ending Inventory 12/31/09

EXPENSES

Advertising	Office supplies
Bank Charges	Postage
Commissions & Fees	Rent:
Contract Labor	Vehicles, machinery & equipment
Dues & Publications	Other business property
Employee Benefits:	Repairs & maintenance
Health Insurance	Supplies
Retirement Plan	Taxes:
Freight	Payroll
Insurance:	Personal Property
Liability	Real estate
Work Comp	Travel (airfare, lodging)
Interest:	Travel (meals & entertainment)
Paid to Bank	Telephone
Other	Utilities
Laundry & Cleaning	Wages (Gross amount)
Legal & Professional	Vehicles: Total Miles Driven
Miscellaneous	Business Miles Driven

IRS requires mileage logs to document any claim for business use of vehicles. Please provide logs.

**Cathy Bowen, Registered Representative
 Securities offered through H. D. Vest Investment ServicesSM Member: SIPC. Advisory services offered through H. D. Vest Advisory ServicesSM
 Non-bank subsidiaries of Wells Fargo & Company*