



**Loid Tax & Accounting, LLC**

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Taxpayer: \_\_\_\_\_  
Company Name: \_\_\_\_\_ FEIN: \_\_\_\_\_  
Address of Business:  
Street 1 \_\_\_\_\_  
Street 2 \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Did you materially participate in business? Y N  
Did you make any payments in 2024 that would require you to file Form(s) 1099? Y N  
If yes, Did you or will you file required Form(s) 1099?  Y N  
Did you have a home office? Y N  
Did you use a personal car for business purposes? Y N  
If yes, Description of Vehicle \_\_\_\_\_  
Personal Miles: \_\_\_\_\_  
Business Miles: \_\_\_\_\_

Note: The IRS requires a log be kept of all business miles, date, description of where you went and whom you met, plus the miles.

Please complete page 2 with all the revenue and expenses related to the business.

**Signature(s)**

I/We believe that the information disclosed in this organizer to be complete & accurate. I /We understand that incorrect or incomplete information may result in an erroneous return.

Sign form by typing your name in the block provided.

Signature 1: \_\_\_\_\_ Date 1: \_\_\_\_\_  
Signature 2: \_\_\_\_\_ Date 2: \_\_\_\_\_

**Income and Expenses (enter whole dollar amounts):**

Sales	_____	Travel	_____
Beginning Inventory	_____	Meals	_____
Purchases	_____	Utilities	_____
Ending Inventory	_____	Wages	_____
Advertising	_____	Payroll Tax	_____
Auto – Repairs/Gas/License	_____	Computer	_____
Commissions and fees	_____	Mobile Phone	_____
Contract Labor	_____	<b>Other</b>	
Employee Benefit	_____	Description	Amount
Insurance	_____	_____	_____
Interest	_____	_____	_____
Legal & Professional	_____	_____	_____
Office Expense	_____	_____	_____
Pension and profit sharing	_____	_____	_____
Rent – vehicles, equip	_____	<b>Fixed Assets Added:</b>	
Rent – other	_____	Description	Amount
Repairs and Maint	_____	_____	_____
Supplies	_____	_____	_____
Taxes & Licenses	_____	_____	_____