

KLEIN

& ASSOCIATES, PLLC

Business Advisors & CPAs

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Annual Summary of Business Income or Loss

Business Income & Expenses	Tax Year:
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Business Name: _____

Business Address: _____

Nature of Business: _____

Business Income:		\$	
Cost of Goods Sold:			
Beginning Inventory		\$	
Cost of Labor	+		
Materials & Supplies	+		
Other Costs	+		
Other Costs	+		
Ending Inventory		\$	

Assets Purchased	Cost	Date Purchased
Buildings		
Improvements		
Computers		
Printers/copiers		
Office Furniture		
Vehicles		
Other:		
Other:		
Other:		
Other:		

Vehicle Information	Yes	No	
Do you use your vehicle for business?	<input type="radio"/>	<input type="radio"/>	
Is the vehicle used exclusively for business?	<input type="radio"/>	<input type="radio"/>	
Date the vehicle was placed into service for the business?	Date		
	Auto 1	Auto 2	
Make, Model, Year			
Total Miles Driven			
Business Miles Driven			
Actual Vehicle Expenses	Cost		
Gas			
Repairs/Oil Changes/Washes			
Insurance			
Interest			
Lease Payments			

Expenses:	Amount
Advertising	
Auto (see below)	
Commissions & Fees	
Contract Labor	
Employee Benefit Programs	
Insurance (other than Health)	
Mortgage Interest Paid	
Other Interest Paid	
Legal & Professional Fees	
Office Expense	
Pension & Profit Sharing Plans	
Rent or Lease (vehicles, equip)	
Rent or Lease (business property)	
Repairs & Maintenance	
Supplies	
Taxes & Licenses	
Travel	
Meals & Entertainment	
Utilities	
Wages	
Other:	
Other:	
Other:	
Total Expense:	\$

Home Office Deduction	
Total Square Footage of Home	
Square Footage of Office	
Square Footage of Storage	
Expenses:	
Insurance	
Utilities	
Maintenance/Repairs	
Rent Only (not mortgage payment)	