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Eldersburg, MD 21784
Phone: 410-549-8950
Fax: 410-549-8952



2702 Back Acre Circle, Ste
220 Mt. Airy, MD 21771
Phone: 301-829-7720
Fax: 301-829-9992

Tax Planner For Sole Proprietors

Name: _____

Cell phone: _____

Email: _____

Home Address: _____

Company Name: _____

EIN #: _____

Company Phone: _____

Company Address: _____

Additional Comments:

*Thank you for taking the time to fill this worksheet out. It will help us as we prepare your tax return. Please note that the 3rd page goes into more detail on certain expense topics. If you have any questions filling out this worksheet, please don't hesitate to contact a New Century team member.

	Q1	Q2	Q3	Q4	Total
Income					
Gross Receipts/Sales					
Returns/Allowances					
Discounts					
Other					
Total Income	0	0	0	0	0
Inventory/Purchases					
Beginning Inventory					
Purchases					
Purchase Discounts					
Returns					
Shrinkage					
Ending Inventory	0	0	0	0	0
Expenses					
Accounting Fees					
Advertising					
Bank Charges					
Business Entertainment					
Business Meals					
Commissions & Fees					
Communication					
Cable					
Phone					
Internet					
Contract Labor					
Dues					
Education					
Employee Benefit Programs					
Equipment/Software					
Interest					
Insurance					
Auto					
Health					
Business					
Mortgage					
Legal/Professional Fees					
Office Supplies/Expenses					
Payroll Fees					
Pension/Profit Sharing Plans					
Rent for Office					
Repairs & Maintenance					
Taxes & Licenses					
Travel					
Vehicle Expenses					
Total Expenses	0	0	0	0	0
Net Income	0	0	0	0	0

Equipment & Software Expenses					
Item	Q1	Q2	Q3	Q4	Date Purchased
Computer					
Fax/scanner					
File Cabinets					
GPS					
Office Furniture					
Software					
Other					
Other					
Total Equipment Expenses	0	0	0	0	

Vehicle Expenses					
Item	Cost/ Payment Q1	Q2	Q3	Q4	Other Information
Description of Auto					
Purchase Price (incl Tax)					
Date Purchased					
Date placed in Bus Use					
Car Leased or Owned?					
Depreciated in prior yrs?					
Miles					
Odometer - end of year					
Business Miles					
Commuting Miles					
Personal Miles					
Total Miles this year	0	0	0	0	
Repairs & Maintenance					
Towing					
Insurance					
Auto License/Tags					
Personal Property Tax					
Auto Club					
Interest (Auto Loan)					
Warrant					
Inspection					
Parking/Tolls					
Car Washes					
Other					
Total Vehicle Expenses	0				

Travel Expenses				
Item	Q1	Q2	Q3	Q4
Air/Train Fare				
Car Rentals				
Gas				
Insurance				
Taxis/Bus				
Lodging				
Meals				
Entertainment				
Tips				
Phone/Faxes				
Dry Cleaning				
Days of Travel				
Tolls/Parking				
Other				
Total Travel	0	0	0	0