



**TREASURE VALLEY CPA**

9446 W. Fairview Avenue  
Boise, ID 83704  
208-322-0720

[www.TreasureValleyCPA.Com](http://www.TreasureValleyCPA.Com)

# BUSINESS INFORMATION SHEET

**DATE:** \_\_\_\_\_

## I. COMPANY INFORMATION

Business Name: \_\_\_\_\_

Description of Business: \_\_\_\_\_

EIN: \_\_\_\_\_ - \_\_\_\_\_ Business Start Date: MM\_\_DD\_\_YEAR \_\_\_\_\_

Business Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Phone Number: (\_\_\_\_)\_\_\_\_ - \_\_\_\_\_ Email: \_\_\_\_\_

Entity Type:  S Corp  C Corp  LLC  LLP  PLLC  PLC  SP

## II. OWNER INFORMATION

Owner Name: \_\_\_\_\_ % of Ownership \_\_\_\_\_

Social Security Number: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ Date of Birth: MM\_\_DD\_\_YEAR \_\_\_\_\_

Owner Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Phone Number: (\_\_\_\_)\_\_\_\_ - \_\_\_\_\_ E-Mail: \_\_\_\_\_

Owner Name: \_\_\_\_\_ % of Ownership \_\_\_\_\_

Social Security Number: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ Date of Birth: MM\_\_DD\_\_YEAR \_\_\_\_\_

Owner Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Phone Number: (\_\_\_\_)\_\_\_\_ - \_\_\_\_\_ Email: \_\_\_\_\_

## NOTES:

\_\_\_\_\_  
\_\_\_\_\_



**TREASURE VALLEY CPA**

9446 W. Fairview Avenue  
Boise, ID 83704  
208-322-0720

[www.TreasureValleyCPA.Com](http://www.TreasureValleyCPA.Com)

**BUSINESS INCOME AND EXPENSES**

You do NOT need to complete this form if you are using Quickbooks or an accounting program. Please provide us with a P&L and Balance Sheet for the end of the year. Send us accountants copy.

**BUSINESS NAME** \_\_\_\_\_

**Year** \_\_\_\_\_

**TOTAL INCOME FROM BUSINESS**

\$ \_\_\_\_\_

**COST OF GOODS SOLD**

Total dollar amt of all inventory at the beginning of the year	\$ _____
Total dollar amt of all purchases for the year	\$ _____
Total dollar amt of all inventory at the end of the year	\$ _____
Total Sub-Contractors expense	\$ _____

**EXPENSES:**

Total receipts for the year, for each item (examples)	
<b>Advertising</b> (brochures, ads, business cards, flyers, signs)	\$ _____
<b>Vehicle Expense</b> (oil change, service, repairs, gas)	\$ _____
<b>Wages</b> (paid to employees)	\$ _____
<b>Insurance</b> (business insurance)	\$ _____
<b>Interest Paid</b>	\$ _____
<b>Legal / Professional fees</b> (lawyer, taxes, consultants)	\$ _____
<b>Office Supplies</b> (pens paper, staples, etc)	\$ _____
<b>Rent or Lease</b> (office rent, storage rent)	\$ _____
<b>Equipment / Machinery Rental</b> (for business use)	\$ _____
<b>Equipment / Machinery Purchase</b> (for business use)	\$ _____
<b>Tools</b> (small tools needed to run the business)	\$ _____
<b>Repairs/Maintenance</b> (computers, or equipment for office)	\$ _____
<b>Tax and License</b> (fees paid - business related)	\$ _____
<b>Travel Expenses</b> (car rental, air travel, tolls, parking fees)	\$ _____
<b>Meals</b> (meals related to business meetings)	\$ _____
<b>Entertainment NOT Allowed</b>	
<b>Utilities</b> (gas, electricity - business related)	\$ _____
<b>Phones</b> (land line, fax line, or cell - related to business)	\$ _____
<b>Internet</b> (fees paid for computer connections, websites)	\$ _____

**Major Purchases over \$1000**

Item: _____	Purchase Date: _____	Purchase Price \$ _____
Item: _____	Purchase Date: _____	Purchase Price \$ _____
Item: _____	Purchase Date: _____	Purchase Price \$ _____

**Other/Misc**

Item: _____	\$ _____
Item: _____	\$ _____

**Total Business Miles**

1st Vehicle	_____
2nd Vehicle	_____