

**PETTIGREW & PETTIGREW
CERTIFIED PUBLIC ACCOUNTANTS**

150 Roberson Mill Road
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BUSINESS INCOME & EXPENSE ORGANIZER

BUSINESS INFORMATION:

Business Name _____ Type of Business _____
(ex. Sole Proprietorship, S-Corporation, Partnership)
 Business Address _____ Federal Identification Number _____
 _____ Business Description _____

- * Did you materially participate in the operation of this business during the current year? Yes () No ()
- * Did you dispose of all or part of your interest in this business during the current year? Yes () No ()

INCOME:

Gross Receipts or Sales _____
 Refunds>Returns _____
 Other Income _____

COST OF GOODS SOLD: (if applicable)

Beginning Inventory _____
 Purchases less Cost
 of Personal Use Items _____
 Labor (not including
 Owner's Salary) _____
 Materials & Supplies _____
 Ending Inventory _____

EXPENSES:

Advertising _____
 Bank Charges _____
 Business Entertainment _____
 Car & Truck Expenses
 or Business Miles Driven _____
 Dues & Subscriptions _____
 Employee Benefits _____
 Equipment Rental/Lease _____
 Freight Charges _____
 Insurance _____
 Interest (Mortgage) _____
 Interest (Other) _____
 Laundry & Linen _____
 Legal & Professional _____

Office Expense _____
 Postage _____
 Rent (Building) _____
 Repairs & Maintenance _____
 Small Tools & Equipment _____
 Sub-contractors _____
 Supplies _____
 Taxes _____
 Telephones _____
 Travel & Lodging _____
 Travel (meals) _____
 Utilities _____
 Wages _____
 Home Office (see reverse) _____
 Other _____

* Did you *purchase* or *sell* any equipment during the current year? Yes () No ()

If yes, please describe below:

Type _____ Purchased () Sold () Date _____ Amount _____
 Type _____ Purchased () Sold () Date _____ Amount _____
 Type _____ Purchased () Sold () Date _____ Amount _____
 Type _____ Purchased () Sold () Date _____ Amount _____

(OVER)

HOME OFFICE:

*Was your home office used regularly for business? Yes () No ()

*Was your home office used exclusively for business? Yes () No ()

If you answered "No" to either of the above questions, a home office expense deduction is not allowable.
If you answered "Yes" to both of the above questions, please continue.

Purchase Price of Home _____

Square Footage of Office _____

Square Footage of Home _____

Expenses:

Mortgage Interest _____ Other Interest Paid _____

Real Estate Taxes _____ Insurance _____

Repairs _____ Maintenance _____

Utilities _____ Other _____

(OVER)