

Bookkeeping Organizer

The bookkeeping organizer is used to collect the information needed to complete your monthly bookkeeping. If you do not have your EIN or date of Incorporation, you should still send the form with all other applicable information.

General Information

Name:	Name of Business:	Entity Type:
Date of Incorporation/Organization:	EIN:	Product or Service offered:
Do you have any credit cards used exclusively for business:	Yes	No
If yes: Name of card:	last 4 digits of card:	
Name of card:	last 4 digits of card:	

If any of the cards listed are used for personal reasons, no matter how small, the interest deduction is disallowed

Date Business Began

Business expenses aren't tax deductible until after the "Start-up" phase and ordinary business operations have begun. For business expenses to become tax deductible, we need an exact date ordinary business operations began. Justification of the date you choose should be documented for your personal records.

What day did ordinary business operations begin? (check one)

Date of First Sale	Other:	Business still in
Date:	Date:	start-up phase*

*If the company never leaves the start-up phase all expenses incurred will be non-deductible for tax purposes.

Start Up Expenses Already Paid

This section is for fees that you have paid to get the business started. Please list all expenses that apply to the categories listed below. If you have any additional start up costs that do not fall under these categories you will list them under the other section along with a brief description of the expense.

	<i>Date Paid</i>	<i>Vendor</i>	<i>Amount</i>
Fee paid to Secretary of State			
Fee paid for Coaching/Training (1)			
Fee paid for Coaching/Training (2)			
Website Building & Design Fees			
Advertising Fees			
Drop Shipper Sign up Fees			
Initial Accounting & Legal Fees			
<i>Description</i>			
Other:			
Other:			
Other:			

Utilities used by the Business

Do you have any utilities that you use for business purposes?	Yes	No	
If yes please estimate the business use percentage			
Home Phone:	Cell Phone:	Fax:	Internet:
