



January 2010

Subject: **BUSINESS TAX ORGANIZER – 2009**
Reference: **BUSINESS TAX FILING DEADLINE – March 15, 2010 (Corporations/LLC's)**
April 15, 2010 (Sole Proprietor)

Dear Business Tax Client:

Attached is your Business Tax Organizer for 2009.

If incorporated, please keep in mind that the filing date for your 2009 corporate tax return is **March 15, 2010** (one month earlier than individual tax returns). Therefore, we will require that you submit your corporate tax information to our office no later than February 15, 2010, which should insure timely filing. If this time table is not convenient for you, we would be pleased to file a six (6) month automatic extension (Form 7004) to file your corporate tax returns. Please contact our office to request that an extension be filed on your behalf.

If not incorporated, we require that you submit your tax information to our office no later than March 11, 2010, to insure timely filing. Sole Proprietor Business tax returns are due **April 15, 2010**, without an extension.

We require the following information in order to file a complete and accurate tax return for your business:

FINANCIAL STATEMENTS:

- Income Statement (Profit/Loss) for 2009
- Balance Sheet at December 31, 2009 (Corporations and LLC's only)

SUPPORTING STATEMENTS:

- List of 2009 equipment purchases (Description, date and amount for each)
- List of 2008 equipment/depreciation schedule (if we did not prepare 2008)
- List of all equipment sold/disposed/traded in 2009
- Any additional tax related information/notices for 2009

When you have gathered all of the above information for 2009, please mail in or drop-off your tax information. Please set an appointment at your convenience should you require additional help or have any questions in arranging the required tax information for 2009.

We look forward to serving you. As always, contact us if you have any questions. Thank you.

Sincerely,

Unbehagen Advisors

BUSINESS TAX ORGANIZER 2009

Business Name: _____
 Address: _____
 City, ST, ZIP _____
 Tax ID (EIN) _____
 Phone: _____ Fax: _____
 Email: _____

Was there an address change from the previous year?	YES	NO
Are you a Sole Proprietor?	YES	NO
If incorporated, are you an "S" Corporation?	YES	NO
Was there a change of shareholders from previous year?	YES	NO
Did we prepare your corporate tax return last year?	YES	NO
If not, please attach a copy of 2008 corporate tax return.	YES	NO

Balance Sheet amounts at 12/31/2009 (complete if you do not have a balance sheet):

ASSETS:

Cash (Ending Bank Balance)	\$ _____
Ending Inventory (At Your Cost)	\$ _____
Accounts Receivable	\$ _____
Loans Receivable	\$ _____
Other Assets (Describe)	\$ _____

LIABILITIES:

Accounts Payable	\$ _____
Payroll Taxes Payable	\$ _____
Sales Taxes Payable	\$ _____
Loans From Shareholders	\$ _____
Notes Payable	\$ _____
Other Liabilities (Describe)	\$ _____

OTHER INCOME:

Interest Income	\$ _____
Divided Income	\$ _____
Rental income (Real Estate)	\$ _____
Other Income (Detail)	\$ _____

NOTES

TAX QUESTIONNAIRE

YEAR _____

BUSINESS NAME: _____

GROSS RECEIPTS	AMOUNT	COMMENTS
TOTAL DEPOSITS AT YOUR BANK (From business only)		
(deduct any personal funds, non-business deposits, returned deposits)		
DIRECT COSTS OF SALES or SERVICES		
PRODUCTS PURCHASED FOR RESALE		
MATERIALS		
EXPENSES		
ACCOUNTING & TAX PREPARATION (Business)		
ADVERTISING (Incl. Flyers, Yellow Pages, Etc.)		
BANK CHARGES (Business Only)		
CAR AND TRUCK EXPENSE (Total from pg. 3)		
CASUAL LABOR (Short term employees, helpers)		
COMPUTER PURCHASE (See pg. 2)		
COMPUTER SUPPLIES (If used for business)		
CONTRACT LABOR (1099-type sub-contractors)		
EDUCATION, BOOKS, SEMINARS		
DUES & BUSINESS PUBLICATIONS (trade magazines, etc.)		
EQUIPMENT PURCHASE (See pg. 2)		
EQUIPMENT RENTAL		
GIFT EXPENSE (Deductible only under \$25 each)		
INSURANCE (Liability, etc. NOT Health)		
INSURANCE - HEALTH/EMPLOYEES		
INSURANCE - HEALTH/OWNER		
INTEREST EXPENSE (incl. Credit cards-business purch)		
INTERNET ACCESS (AOL,Cable, DSL, etc)		
LAUNDRY (of work uniforms)		
LEGAL & PROFESSIONAL		
MEALS (Lunches, etc w/clients or associat.)/ENTERTAINMENT		
OFFICE AT HOME (check here & talk to us)		
OFFICE EXPENSE (bus. Cards, stationary, etc.)		
TAXES/PAYROLL (NOT WITHHOLDING TAX)		
POSTAGE (incl. Courier, UPS, FedEx, P.O. box rental)		
PROMOTION EXPENSE (shows, parties, etc)		
RENT (office, store, warehouse, etc)		
REPAIRS OF EQUIPMENT OR OFFICE AREA		
SALARIES - OFFICERS OF CORP. (GROSS AMOUNTS)		
SALARIES & WAGES - OTHER EMPLOYEES (GROSS AMOUNTS)		
SUPPLIES		
TAXES & LICENSES (NOT income tax)		
TELEPHONE - BUSINESS LINE (incl. Fax)		
TELEPHONE - CELLULAR		
TOLLS, PARKING, ETC		
TOOLS		
TRAVEL & LODGING (Airfare & hotel)		
UNIFORMS, WORK SHOES, ETC.		
UTILITIES		
OTHER BUSINESS EXPENSES (Attach list please)		
BANK BALANCE AT END OF YEAR (12/31) - CHECKING		IMPORTANT

AUTO EXPENSES

VEHICLE #1	AMOUNT	COMMENT
CAR MAKE – MODEL – YEAR:		
WHEN VEHICLE PURCHASED OR PLACED IN SERVICE		
TOTAL MILES DRIVEN DURING THE CALENDAR YEAR		
BUSINESS MILES		
PERSONAL MILES		
TOTAL INTEREST PAID ON THE CAR LOAN		
IF THE VEHICLE IS OLDER AND INEXPENSIVE WE CHOOSE THE MILAGE METHOD (55 CENTS PER MILE FOR 2009) AND THE INFORMATION BELOW IS NOT NEEDED, OTHERWISE FILL OUT (ONLY IF THE VEHICLE IS OWNED BY THE CORPORATION):		
TOTAL PURCHASE PRICE INCLUDING SALES TAX AND TAG		
AUTO INSURANCE		
GASOLINE		
OIL CHANGES		
REPAIRS (INCLUDE PARTS)		
AUTO CLUBS (AAA, AMOCO, ETC.)		
CAR WASHES, ETC.		
ANNUAL REGISTRATION & EMISSION INSPECTION		

VEHICLE #2	AMOUNT	COMMENT
CAR MAKE – MODEL – YEAR:		
WHEN VEHICLE PURCHASED OR PLACED IN SERVICE		
TOTAL MILES DRIVEN DURING THE CALENDAR YEAR		
BUSINESS MILES		
PERSONAL MILES		
TOTAL INTEREST PAID ON THE CAR LOAN		
IF THE VEHICLE IS OLDER AND INEXPENSIVE WE CHOOSE THE MILAGE METHOD (55 CENTS PER MILE FOR 2009) AND THE INFORMATION BELOW IS NOT NEEDED, OTHERWISE FILL OUT (ONLY IF THE VEHICLE IS OWNED BY THE CORPORATION):		
TOTAL PURCHASE PRICE INCLUDING SALES TAX AND TAG		
AUTO INSURANCE		
GASOLINE		
OIL CHANGES		
REPAIRS (INCLUDE PARTS)		
AUTO CLUBS (AAA, AMOCO, ETC.)		
CAR WASHES, ETC.		
ANNUAL REGISTRATION & EMISSION INSPECTION		