



Adam M. Beaudry, CPA, LLC
Certified Public Accountant

Business Information Sheet

Name of Business:

Advertising & Promotion	\$	Administrative Expense	\$
Client Gifts	\$	Contractor Expense	\$
Employee Gifts	\$	Salaries/Gross Wages	Provide PR docs
Business Donations	\$	Employer Payroll Taxes Paid	\$
Networking Expense	\$	Employee Benefits Paid	\$
Meals (for staff)	\$	Employer Cont. to Retirement	\$
Meals (for business meetings)	\$	Books/Magazines/Publications	\$
Meals (while traveling)	\$	Education/Training Expense	\$
Commissions Paid	\$	Seminars/Workshop Expense	\$
Office Rent	\$	Dues	\$
Office Supplies	\$	Subscriptions	\$
Equipment Rental	\$	Licenses	\$
Tools	\$	Permits	\$
Supplies/Materials	\$	Legal & Professional Fees	\$
Repairs & Maintenance	\$	Tax Services	\$
Cleaning	\$	Liability Insurance	\$
Postage	\$	Workers Comp Insurance	\$
Post Office Box	\$	Loan Interest Paid	\$
Telephone Expense	\$	Credit Card Interest Paid	\$
Internet Expense	\$	Credit Card Usage Fees	\$
Website Expense	\$	Bank Service Charges	\$
Technology Expense	\$	Travel: Lodging	\$
Printing/Copying	\$	Travel: Transportation	\$
Letterhead/Business Cards	\$	Utilities (not home office)	\$
Beginning Inventory	\$	Health Ins. (Out of Pocket)	\$
Ending Inventory	\$		\$
		Business Revenue Received:	\$

1. Did you purchase or sell real estate this year? (If yes, please provide us with the HUD) ☐ Yes ☐ No
2. Have you moved in the last 12 months? ☐ Yes ☐ No
If so, what is your current address?
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3. Did you make any payments that required you to file a 1099 NEC Form to anyone else? ☐ Yes ☐ No
If so, were they filed? (Please provide copies of issued forms.)
4. Did you pay any of your employees overtime in 2025? ☐ Yes ☐ No
5. Did any of your employees receive tips in 2025? ☐ Yes ☐ No

Federal Quarterly Tax Payments	Date	Amount
Payment 1		\$
Payment 2		\$
Payment 3		\$
Payment 4		\$

State Quarterly Tax Payments	Date	Amount
Payment 1		\$
Payment 2		\$
Payment 3		\$
Payment 4		\$

Office Furniture, Equipment, Improvements, Vehicle Purchases: (Purchases that exceed \$2,500)

Item	Purchase Date	Purchase Price

Vehicle

Make		Model		Year	
Purchase Price	\$	Purchase Date			
Total Miles		Business Miles			

*A mileage log should be kept throughout the year to track business mileage.

Parking	\$	Maintenance	\$	Excise Tax	\$
Tolls*	\$	Cleaning	\$	Inspection	\$
Gas	\$	Insurance	\$	Lease Payments	\$
Oil Changes	\$	Registration	\$	Auto Club	\$
Repairs	\$	License	\$		

*Log into your EZ Pass account to print out a summary of the yearly toll costs.

Home Office: (A portion of your home that is used solely for business purposes)

Total SqFt of Home	ft2
Total SqFt of Office	ft2

Direct Expenses (benefit only home office)	
Repairs & Painting	\$
Insurance	\$
Other	\$

Indirect Expenses (benefit entire home)	
Gas & Electricity	\$
Water & Sewage	\$
Repairs	\$
Supplies	\$
Painting	\$

Labor (not your own)	\$
Insurance	\$
Garbage Removal	\$
Cleaning Services	\$
Landscaping	\$
Snow Service	\$
Condo Fee	\$
Security System	\$
Rent	\$
Mortgage Interest	\$
Mortgage Insurance	\$
Real Estate Taxes	\$
Other	\$
Other	\$

Bank Information:

Name of Bank:	<input type="checkbox"/> Checking <input type="checkbox"/> Savings
Routing Number:	Account Number:

How do you prefer to receive possible refunds:	<input type="checkbox"/> Direct Deposit	<input type="checkbox"/> Check
How do you prefer to make tax payments that may be due:	<input type="checkbox"/> Direct Debit	<input type="checkbox"/> Check

Notes for Accountant: