

Thomas G. Post, CPA Office
Taxes for Small Business, Family Partnerships,
Estates, Trusts, and Individuals
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**12 Simple Things That We Need to Prepare a Complete
And Accurate Small Business Income Tax Return**

1. Schedule of money you took out of the business that was earned from January 1 to December 31, 20__ .
2. Schedule of gross receipts or sales (12 months).
3. Schedule of Cost of Goods Sold – labor and materials, and any other variable costs (12 months).
4. Schedule of Operating Costs/ Overhead (12 months).
5. Schedule of business assets purchased.
6. Schedule of loans made and repayments from 01/1/___ to 12/31/___.
7. Balance Sheet 12/31/___ (if needed).
8. Vehicle Travel and Entertainment Expense Worksheet.
9. Business use of Home Worksheet (Form 8829).
10. Copy of previous year's Small Business Income Tax Return (with Depreciation Schedule).
11. Copy of 20__ Payroll Tax Reports.
12. Copy of 20__ Forms 1096 and 1099's.

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The taxpayer agrees to supply the information requested on page one above.

The taxpayer also agrees to hire the CPA firm to prepare the 20__ Small Business Income Tax Return.

The taxpayer agrees to review the tax return when it is finished to make sure it is true correct and complete. The taxpayer will discuss any perceived omissions or misstatements with the CPA before the return is filed so they can be corrected.

The fees for this tax preparation engagement will be based on the time spent at the CPA's standard rate of \$200.00 per hour.

The fee estimate is detailed below. The taxpayer will pay one half of the estimated fee when this engagement letter is signed and the balance when the completed tax return is signed.

Agreement accepted by:

Signature

date

Down Payment Received

Check Number

Thomas G. Post, CPA