



2019 Year-End Business Data Sheet

RETURN THIS COMPLETED FORM TO LET US KNOW YOUR ACCOUNTING IS UP-TO-DATE AND READY FOR TAX RETURN PREPARATION.

Tell us how to access your accounting records by checking the appropriate solution below:

- QuickBooks Desktop backup enclosed or uploaded to client portal (*password: _____*)
- QuickBooks Online (*accounting for January through December is ready for review*)
- Other (*records are enclosed or uploaded to client portal*)

A Do you use a vehicle for your business in 2019? *If yes, list vehicle information below:* Yes No

Did you drive a company car in 2019? *If yes, list vehicle information below:* Yes No

| | Vehicle 1 | Vehicle 2 | Vehicle 3 |
|------------------------------|-----------|-----------|-----------|
| Year and make | | | |
| Total miles for the year | | | |
| Business miles for the year | | | |
| Commuting miles for the year | | | |

Do you have evidence to support the business miles? Yes No

Is the evidence for business miles written evidence? Yes No

Do you have another vehicle available for personal use? Yes No

B Did you purchase anything through the business that was for personal use? Yes No
If yes, please explain.

C Do you provide service(s) or deliver product(s) in states other than Pennsylvania? Yes No

If yes, please list the states and corresponding income: _____

D Do you have a capitalization policy? Yes No

E Did you acquire any new assets or equipment greater than \$2,500? Yes No
If yes, please provide a list and indicate if new or used, or provide a copy of the invoice.

FAYETTEVILLE OFFICE

4148 Lincoln Way East
Fayetteville, PA 17222

Ph/Fx 717.352.3737

MCSHERRYSTOWN OFFICE

526 Main Street
McSherrystown, PA 17344

Ph/Fx 717.637.5457

WAYNESBORO OFFICE

18 North Oller Avenue
Waynesboro, PA 17268

Ph/Fx 717.762.3161

LEOLA OFFICE

198 East Main Street
Leola, PA 17540

Ph/Fx 717.556.0007



F Did you make any payments in 2019 that would require you to file Form(s) 1099? Yes No

If yes, did you file or will you file all required Form(s) 1099? Yes No

G Did you receive any Form(s) 1099-K? Yes No

If yes, please provide a copy of each form received.

H Did you have any gift card sales not included in income? Yes No

If yes, please list the amount: \$ _____

I Did you pay wages to employees? Yes No

If yes and payroll was not prepared by our firm, please provide us with your Forms W-3 and W-2 to assist us in the calculation of the 20% Qualified Business Income Deduction.

J Did you purchase health insurance for your employees? Yes No

If yes, did you purchase through the Small Business Health Options Program (SHOP) Marketplace? Yes No

K Insurance paid for shareholder/partner or proprietor:

*Note: If your business is an S-corporation, we will need the health insurance amount for your W-2 preparation.

| Provider | Health insurance amount | Life insurance amount | Disability insurance amount |
|----------|-------------------------|-----------------------|-----------------------------|
| | | | |
| | | | |
| | | | |
| | | | |

L Information on credit cards and loans for business & mortgages: (Complete if the balances are not reconciled in your accounting software or on the financials that you provided for us to complete your tax return.)

| Name of creditor | Loan balance | Interest paid/year |
|------------------|--------------|--------------------|
| | | |
| | | |
| | | |

M Please provide your NAICS code and/or a description of your business activity: _____

N If taxed as a partnership, who is your partnership's representative? _____

IMPORTANT: Please review the enclosed depreciation schedule. Indicate if sold or scrapped, and when. If an asset was sold, please list the sale price.

To the best of my knowledge, the above information is true and correct.

Signature: _____ Date: _____

Title: _____

DID YOU KNOW? FILING DEADLINE FOR FORMS 1099

The deadline for filing Forms 1099 with the IRS and providing the forms to contractors is **January 31, 2020**.

It is important to prepare and file them early, if possible.