Hartlaub Organizer for Business/Rental Property 2023

INCOME FROM BUSINESS OR PROFESSION

GENERAL INFORMATION		
☐ Cash Basis	☐ Accrual	☐ 1st Year
Principal Business/Profession		
Business Name		
Business Address		
City	State	Zip

INCOME	
Gross Receipts or Sales	
Returns & Allowances	
Other Income	
COST OF GOODS SOLD (if applicable)	
Inventory at Beginning of the Year	
Purchases	
Cost of Labor	
Materials & Supplies	
Other Costs	
Inventory at End of the Year	
EXPENSES	
Advertising	
Car & Truck Expenses*	
Commissions	
Employee Benefits	
Insurance (other than health)	
Health Insurance Premiums for Self*	
Interest	
Legal & Professional	
Office Expenses	
Pensions & Profit Sharing	
Rent - Vehicles, Machinery & Equipment	
Rent - Business Property	
Repairs & Maintenance	
Supplies	
Taxes - Property	
Taxes - Other	
Travel	
Meals*	
Utilities	
Wages	
Other Expenses*	

**Attach detailed schedules*

HOME OFFICE

Did you have a home office during the year? ☐ Yes ☐ NO

If yes, attached detailed schedule of expenses including mortgage interest (or rent), real estate taxes, utilities, property insurance, maintenance & cleaning.

RENTAL INCOME & EXPENSES

PROPERTY	#1	#2
Location		
INCOME		
Rent Received		
EXPENSES		
Advertising		
Association Dues		
Auto & Travel		
Cleaning/Maintenance		
Insurance		
Labor		
Professional Fees		
Miscellaneous		
Mortgage Interest		
Other Interest		
Repairs & Maintenance		
Supplies		
Taxes		
Telephone		
Utilities		
Improvements:		
Other:		

Recommendations Welcome

We would welcome introductions to your family, friends & business associates who may need help with their taxes, financial planning and business needs.

Call us at 513-821-8768 for hours and to set your appointment today.

Sincerely,

Cindy Peters, CPA