



DP FINANCIAL & TAX, INC.

4775 E 91ST ST S, STE 200, TULSA, OK 74137
PHONE: 918.392.7879 | FAX: 918.392.7079

GENERAL INFORMATION

Company _____ EIN/SSN _____

Filed any Form(s) 1099?

Principal Business or profession _____ **Yes** **No**

Business Address _____ City _____ State _____ Zip _____

Business Email _____ Business Phone Number _____

Entity Type (Circle one) **Sole Proprietor** **S Corp** **C Corp** **Partnership**

ACCOUNT BALANCES

Include Bank Accounts, Credit Cards, Loans, etc.

<i>Account</i>	<i>Beginning Balance</i>	<i>Ending Balance</i>

Was there an ownership change? **Yes** **No**

OWNER INFORMATION

Shareholder/Partner Name _____	SSN _____	Percent Owner _____
Address _____	City _____	State _____ Zip _____
Email _____	Phone Number _____	

Shareholder/Partner Name _____	SSN _____	Percent Owner _____
Address _____	City _____	State _____ Zip _____
Email _____	Phone Number _____	

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BUSINESS INCOME

	<i>Amount</i>	<i>Notes</i>
Reported on Form(s) 1099		
Other Income		
Other Income		

BUSINESS EXPENSES

	<i>Amount</i>		<i>Amount</i>
Compensation of Officers		De Minimis Supplies/Repairs*	
Employee Salaries and Wages		Equipment Rent	
Repairs and Maintenance		Client Gifts	
Bad Debts		<i>Insurance</i>	
Rent		Officer Health Insurance	
State Franchise or Income Taxes/Fees		Employee Health Insurance	
<i>Payroll Taxes</i>		Liability	
SS		Internet/ Website*	
MED		Janitorial	
FUTA		Laundry and Cleaning	
SUI		Legal and Professional	
Other Taxes		Meals	
Licenses		Entertainment	
Interest		Office Expense	
Advertising		Outside Sevices/Contractors	
Pension/Profit-Sharing Plans		Payroll Processing Fees*	
Employee Benefit Programs		Parking Fees and Tolls	
Accounting		Permits and Fees	
Amortization		Postage	
Automobile/Truck Expense		Printing	
Bank Charges		Reimbursement Expense*	
Charitable Contributions*		Security	
Cleaning		Supplies	
Commissions		Telephone	
Computer Services and Supplies		Tools	
Credit and Collection Costs		Training/Continuing Education	
Delivery and Freight		Travel	
Discounts		Uniforms	
Dues and Subscriptions		Utilities	

*Common other business expenses.

