RG TAX ACCOUNTING & RESOLUTION LLC

Tax Organizer
Commercial Fisherman

Year: ______________

Name ______________________________ Corporation ______________________________

Telephone ______________________________ Email ______________________________

Business Use of Home:

Square Footage of Business ____________
Total Square Footage ____________
Homeowners Insurance ____________
Leasehold Improvements ____________
Rent ____________

Mortgage Interest ____________
Property Tax ____________
Repairs: Direct ________ Indirect ________
Utilities: Heat ________ Electric ________

Gross Income ____________

Cost of Goods Sold
Purchases ____________
Cost of Labor ____________

Self Employed Health Insurance ____________
If you purchased ObamaCare, you will need to bring form 1095A to your appointment.

Advertising ____________

Car & Truck
Fuel ____________
Repairs ____________

Tolls & Ferry ____________

Commissions/Fees ____________

Insurance
Vehicle ____________
Boat ____________

*****Interest Expense**

Boat ______

Bank (Form 1098) ______

Business Loans (i.e. trap loan, engine repower) ______

Credit Cards ______

Vehicle ______

Legal & Professional Fees ______

Office Expense ______

Rent

Equipment Lease (equipment/vehicle, etc.) ______

Property ______

Repairs & Maintenance ______

Supplies ______

Taxes & Licenses

Fishing Licenses ______

Payroll ______

Property (real estate) ______

Excise Tax (vehicle) ______

Sales ______

Travel & Lodging ______

Meals & Entertainment ______

Direct Commercial Utilities ______

Wages (payroll, please bring payroll returns) ______

Bait ______

Fuel

Diesel ______

Gas (off road)

    Gallons ______

    Average Price ______

Trap Stock (rope, buoys, spindles, etc.) ______

Wharf ______

Dock Expense ______

Mooring Fee ______

Uniforms/Protective Gear ______

Foul Weather Gear ____________________

Telephone ____________________

Cellular Phone ____________________

Internet Service ____________________

Periodicals, Magazines, Publications ____________________

Freight & Postage ____________________

Casual Labor (dock help, buoy painter etc.) ____________________

Contract Labor (sternman) ____________________

Misc./Sundry ____________________

Business Gifts ____________________

Bank Service Charges ____________________

Haul out & Launching ____________________

Oil Expense ____________________

Shop Expense ____________________

Dues & Fees ____________________

Vehicle Mileage

Business ____________________

Personal ____________________

IRA/Retirement Contributions ____________________

New Equipment Purchases

(Furnishings, electronics, traps, etc.)

Description	**Price**

Dependent Information

Name	Relationship	SS#	Date of Birth

NOTE: Things you need to bring to your appointment

- Completed Tax Organizer or Profit & Loss Statement
- Balance Sheet that lists new assets acquired for current year
- W-2 Wage & Earning Statements from employer(s)
- All 1099's that were issued to you from banks, businesses or investment groups
- If you purchased ObamaCare, you will need to bring form 1095A to your appointment
- If you have sold stocks/bonds in the past tax year, we need date purchased and what it cost you at the time of purchase
- If you are a new client, please bring your three (3) previous years taxes (Fed 1040 & State 1040-ME)

Please call your financial lender and obtain the amount you paid for interest on all your loans (auto, business, home, etc.)