

SELF-EMPLOYED TAX PLANNER 2006

Use this planner to help organize your self employed business income and expenses. Please be specific when listing the amounts of your itemized expenses. (For example, instead of simply writing that you spent \$1500.00 on advertising, tell me how much was business cards, how much was t-shirts, etc.) I will call you before we electronically file your tax return to insure that we've covered everything and to get your SSN, dependent information, etc. If you have questions, don't hesitate to contact me.

PERSONAL INFORMATION

Name: _____

Telephone Number: _____

BUSINESS INFORMATION

Principle service performed: _____ EIN (if any): _____

Business name (if different from yours): _____

Business Address: _____

INCOME INFORMATION

Gross Sales or Fees Earned in 2006: _____

(expense information on page 2)

EXPENSES *(feel free to use another page if there isn't enough room on the lines)*

page 2

Advertising (business cards, web site, flyers, t-shirts, etc.): _____

Commissions & Fees (fees paid to another individual for helping): _____

Insurance (liability, health): _____

Interest paid (credit card, mortgage): _____

Legal and Professional Services (attorneys, accountant, etc.): _____

Office expenses (pens, paper, white out, etc.): _____

Supplies (supplies used by you in your profession): _____

Rent (office rent, space rent, equipment rental): _____

Repairs & Maintenance (equipment repair or maintenance) _____

Taxes & Licenses (state boards, city licenses, renewals, etc.): _____

Meals & Entertainment (business lunches, outings with clients, etc.): _____

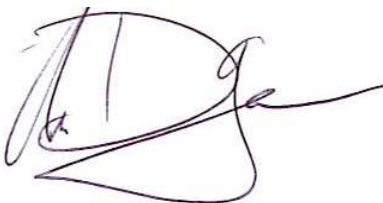
Utilities (telephone, electricity, cell phone, etc.): _____

Others (cleaning, small tools, carwashes, haircuts, etc.) _____

Once you've filled in the blanks that apply to you, send me this form via fax, email, mail, or bring it with you to your appointment.

I look forward to working with you this tax season.

Sincerely,

A handwritten signature in black ink, appearing to read 'Andrew D Gardner', with a long horizontal flourish extending to the right.

Andrew D Gardner