



Tax Organizer Commercial Fisherman

Name _____ Corporation _____

Telephone _____ Email _____

Business Use of Home:

Square Footage of Business	_____	Mortgage Interest	_____
Total Square Footage	_____	Property Tax	_____
Homeowners Insurance	_____	Repairs: Direct	_____ Indirect _____
Leasehold Improvements	_____	Utilities: Heat	_____ Electric _____
Rent	_____		

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.)