Form 2

Equipment

Client Name: _____

Equipment you have purchased in the **current tax year**. Do not include equipment and tools converted from personal use to business use. These are listed in the Deduction Finder and Tax Organizer. Include equipment purchased by credit card.

Date	Posting Reference	Description of Item Purchased	Amount Paid

(Posting reference is the check number, credit card, or cash used to purchase the equipment)

Check list of additional documents we need:

[] Copy of last year's personal and business tax return if you are a new client.
[] Business and Personal Tax Deduction Finder and/or Tax Organizer
[] Sales tax reports
[] Copy of IRS Form 941 and State Unemployment reports if you had employees.
[] Copy of IRS Forms W-2/W-3 if you had employees.
[] Copy of IRS Forms 1099 if you had sub-contractors.
[] Copy of IRS Form 1096 if you had sub-contractors.
[] Copy of all business bank statements (we do not need the checks) for this tax year.

IMPORTANT: Notes about unusual income/expense items you wish to discuss:

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(Put your firm contact information in this area.)