# Partnership Tax Organizer

Use a separate organizer for each partnership

| Partnership   | General Informat  | ion                                    |                                      |                         |                                 |                                     |                 |                    |         |        |       |
|---|---|--|--------------------------------------|-------------------------|---------------------------------|-------------------------------------|-----------------|--------------------|---------|--------|-------|
| Legal name of partnership   |   |  |                                      |                         |                                 | EIN                                 | EIN –           |                    |         |        |       |
| Partnership a   | ddress  |  |                                      |                         |                                 |                                     | 1               |                    |         |        |       |
| Partnership F   | Representative  |  |                                      | Title                   |                                 |                                     |                 |                    |         |        |       |
|   | -<br>-  |  |                                      | Email                   |                                 |                                     | Phone           | ( )                |         |        |       |
| Check one:  | General Partners  | hip 🛛 Limited                          | Partnership 🛛 L                      | imited I                | Liability Partn                 | ership (LLP)                        | ·               |                    |         |        |       |
| Principal bus   | iness activity  |  |                                      |                         |                                 |                                     | Date bu         | siness start       | ed      | /      | /     |
| Principal pro   | duct or service   |  |                                      |                         |                                 |                                     | Date bu         | siness close       | d       | /      | /     |
| 🗆 Yes 🗅 No  | Was the primary purpose of the partnership activity to realize a profit?  |  |                                      |                         |                                 |                                     |                 |                    |         |        |       |
| □ Yes □ No  | Has the partners  | nip reported any                       | losses in prior ye                   | ars?                    |                                 |                                     |                 |                    |         |        |       |
| Accounting n  | nethod: 🛛 Cash 🗌  | □ Accrual □ O                          | ther (specify)                       |                         |                                 |                                     |                 |                    |         |        |       |
| □ Yes □ No  | Does the partners   | ship file under a                      | calendar year? (If                   | no, wha                 | t is the fiscal ye              | ear?)                               |                 |                    |         |        |       |
| Partnership   | Specific Question   | ıs                                     |                                      |                         |                                 |                                     |                 |                    |         |        |       |
| 🗆 Yes 🗖 No  | Is there a written <i>partnership agreen</i>  |  | eement? (If this is                  | the first g             | year of the part                | nership's existen                   | ce, please prov | ide a copy of      | the wi  | ritten | !     |
| 🗆 Yes 🗅 No  | Are all partners a  | ctively participa                      | ting in the busine                   | ss?                     |                                 |                                     |                 |                    |         |        |       |
| 🗆 Yes 🗅 No  | Is any partner in   | the partnership a                      | a disregarded ent                    | ity, a pai              | rtnership, a tr                 | ust, an S corpor                    | ation, or an e  | estate?            |         |        |       |
| □ Yes □ No  | Is the partnership  | o a partner in and                     | other partnership                    | ?                       |                                 |                                     |                 |                    |         |        |       |
| 🗆 Yes 🗅 No  |   |  |                                      |                         |                                 |                                     |                 |                    |         |        |       |
| 🗆 Yes 🗖 No  | Did the partnersh<br>classes of stock en  | nip own directly<br>ntitled to vote of | 20% or more, or of any foreign or do | own, dir<br>mestic o    | ectly or indire<br>corporation? | ctly, 50% or mo                     | ore of the tota | l voting po        | wer of  | all    |       |
| □ Yes □ No  | <ul><li>classes of stock entitled to vote of any foreign or domestic corporation?</li><li>Did the partnership have any debt that was cancelled, was forgiven, or had the terms modified so as to reduce principal amount of debt?</li></ul> |  |                                      |                         |                                 |                                     |                 |                    |         |        |       |
| □ Yes □ No  |   |  |                                      |                         |                                 |                                     |                 |                    |         |        |       |
| □ Yes □ No  | 5   | bution of proper                       | rty or a transfer (b                 | y sale o                | r death) of a p                 | artnership inte                     | rest during t   | he tax year?       | ,       |        |       |
| □ Yes □ No  |   |  |                                      |                         |                                 |                                     |                 |                    |         |        |       |
| □ Yes □ No  | Did the partnersh<br>If yes, include a c  | nip pay \$600 or n                     | nore of nonemplo                     | ţ.                      |                                 |                                     | ?               |                    |         |        |       |
| □ Yes □ No  |   |  |                                      | ogram (                 | PPP) loan that                  | was forgiven i                      | n 2024?         |                    |         |        |       |
| □ Yes □ No  |   |  |                                      |                         |                                 |                                     |                 |                    |         |        |       |
| <b>Principal Pa</b>   | rtners Ownership  |  |                                      |                         | <u> </u>                        |                                     |                 | ,                  |         |        |       |
| •   | •   | Tax ID number                          |                                      |                         |                                 |                                     | Ownership       | General            | or      | 1      | I.S.  |
| Name  |   | (SSN or EIN)                           | Address                              |                         |                                 |                                     | percentage      | limited par        | rtner*  | cit    | izen? |
|   |   |  |                                      |                         |                                 |                                     |                 |                    |         |        |       |
|   |   |  |                                      |                         |                                 |                                     |                 |                    |         |        |       |
| Limited par   | t <b>ner.</b> A general par<br>t <b>ner.</b> A limited par<br>or is required to c   | tner's personal l                      | iability for partne                  |                         |                                 |                                     | of money or     | other prope        | rty the | e par  | tner  |
|   | er Transactions   |  | <u> </u>                             |                         |                                 |                                     |                 |                    |         |        |       |
|   |   |  | Capital<br>from pa                   | contributions<br>ertner | Distributions<br>to partner     | Partner loa<br>the partners         |                 | s repai<br>iership |         | artner |       |
|   |   |  |                                      |                         |                                 |                                     | , ,             | . ,                |         |        |       |
|   |   |  |                                      |                         |                                 |                                     |                 |                    |         |        |       |
| All Clients -   | Additional informat   | tion and document                      | ts required                          |                         | New Client                      | s – Additional in                   | formation and   | l documente        | requir  | ed     |       |
|   |   |  |                                      |                         | Date partner                    |                                     |                 |                    | . oquin |        |       |
|   |   |  |                                      |                         | rship formed in                 | 1                                   |                 |                    |         |        |       |
| of business bank accounts with ending cash balance.                 |   |  |                                      | ^                       | pies of the part                |                                     | ement and       | any of             | her     |        |       |
| • If the partnership has employees or paid independent contractors, |   |  |                                      | s,                      | supporting                      | g organizationa<br>pies of deprecia | l documents.    |                    | •       |        | MT.   |

| 1099-MISC, and any other forms issued to workers.                        | • Provide conice of the returned for last two years including state |
|--|---|
| • If any partners live in a different state or outside the U.S., provide | • Provide copies of tax returns for last two years, including state |
| details. The business may be subject to withholding requirements.        | returns (if applicable).  |

|   | Partnership assets at year e    | nd                 |                                 | Partnership de                            | bts and equity at ye    | ar end  |
|---|---------------------------------|--------------------|---------------------------------|---|-------------------------|---------|
| Bank account end o  | of year balance                 | \$                 | Αссоι                           | ints payable at year end                  |                         | \$      |
| Accounts receivabl  | e at end of year                | \$                 | Payab                           | bles less than one year                   | \$                      |         |
| Inventories   | ·                               | \$                 | Payab                           | oles more than one year                   |                         | \$      |
| Loans to partners   |                                 | \$                 | Nonre                           | ecouse loans                              |                         | \$      |
| Mortgages and loa   | ns held by partnership          | \$                 | Loans                           | from partners                             |                         | \$      |
| Stocks, bonds, and  | securities                      | \$                 | Partn                           | ers' capital accounts                     |                         | \$      |
| Other current asset   | s (include list)                | \$                 |                                 |   |                         |         |
| Partnership Incon   | ne (include all Forms 1099-K, l | Forms 1099-MISC, a | and Forms 1099-                 | NEC received)                             |                         |         |
| Gross receipts or sa  | iles                            | \$                 | Divid                           | end income (include all 1                 | 099-DIV Forms)          | \$      |
| Returns and allowa  |                                 | \$ (               | ) Capit                         | al gain/loss ( <i>include all 1</i>       | 099-B Forms)            | \$      |
| Interest income (ind  | clude all 1099-INT Forms)       | \$                 |                                 | income/loss (include a s                  |                         | \$      |
| Partnership Cost o  | of Goods Sold (for manufact     | urers, wholesalers |                                 |   |                         |         |
| Inventory at begins   |                                 | \$                 |                                 | rials and supplies                        |                         | \$      |
| Purchases   | <u> </u>                        | \$                 |                                 | tory at the end of the year               | ar                      | \$      |
| Cost of labor   |                                 | \$                 |                                 | j j cite of the jet                       |                         | *       |
| Partnership Expe  | nses                            | *                  | 1                               |   |                         | 1       |
| Advertising   |                                 | \$                 | Meals                           | – business                                |                         | \$      |
| Bad debts   |                                 | \$                 |                                 | ffice supplies                            |                         | \$      |
| Bank charges  |                                 | \$                 |                                 | Organization costs                        |                         |         |
| Business licenses   |                                 | \$                 |                                 | Pension and profit sharing plans          |                         |         |
| Commissions and f   | fees                            | \$                 |                                 | Rent or lease – car, machinery, equipment |                         |         |
| Contract labor  |                                 | \$                 |                                 | or lease – other business                 |                         | \$      |
| Employee benefit programs   |                                 | \$                 |                                 | rs and maintenance                        | 1 1 1 1 1               | \$      |
| Employee health care plans  |                                 | \$                 | ^                               | – payroll                                 |                         | \$      |
| Entertainment (not deductible)  |                                 | \$                 |                                 | – property                                |                         | \$      |
| Gifts   | ,                               | \$                 | Taxes – sales                   |   |                         | \$      |
| Guaranteed payme  | ents to partners                | \$                 | Taxes – state                   |   |                         | \$      |
| Insurance (other tha  |                                 | \$                 | Telephone                       |   |                         | \$      |
| Interest – mortgage   | 2                               | \$                 | Utilities                       |   | \$                      |         |
| Interest – other  |                                 | \$                 |                                 | Wages                                     |                         | \$      |
| Internet service  |                                 | \$                 |                                 | er expense                                |                         | \$      |
| Legal and professio   | onal services                   | \$                 |                                 | Other expense                             |                         | \$      |
| 0 1   | a separate form for each vehi   | I                  | I                               |   |                         | 1       |
| Make/Model  |                                 |                    |                                 | Date car placed in serv                   | vice / /                |         |
|   |                                 |                    | ours?                           | 1   | . ,                     |         |
|   | ou (or your spouse) have ar     |                    |                                 | Did you trade in your                     | car this year? $\Box$ Y | es 🛛 No |
| $\frac{1}{1} \text{ Yes } \square \text{ No}  \text{Do you have evidence?}$ |                                 | •                  | Cost of trade-in Trade-in value |   |                         |         |
|   |                                 |                    | \$                              | \$  |                         |         |
| Mileage   |                                 |                    |                                 | Actual Expenses                           |                         |         |
| Beginning of year odometer  |                                 |                    |                                 | Gas/oil                                   | \$                      |         |
| End of year odometer  |                                 |                    |                                 | Insurance                                 | \$                      |         |
| Business mileage  |                                 |                    |                                 | Parking fees/tolls                        | \$                      |         |
| Commuting mileage   |                                 |                    |                                 | Registration/fees                         | \$                      |         |
| Other mileage   |                                 |                    |                                 | Repairs                                   | \$                      |         |

purposes. However, to use the standard mileage rate, it must be used in the first yea then choose between either the standard mileage rate method or actual expenses.

| Equipment Purchases – Enter the following information for depreciable assets purchased that have a useful life greater than one year |                |      |                        |              |  |  |
|--|----------------|------|------------------------|--------------|--|--|
| Asset  | Date purchased | Cost | Date placed in service | New or used? |  |  |
|  |                | \$   |                        |              |  |  |
|  |                | \$   |                        |              |  |  |
|  |                | \$   |                        |              |  |  |
|  |                | \$   |                        |              |  |  |
|  |                | \$   |                        |              |  |  |
|  |                | \$   |                        |              |  |  |
|  |                | \$   |                        |              |  |  |

| Equipment Sold or Disposed of During Year |                     |           |                   |           |  |  |
|---|---------------------|-----------|-------------------|-----------|--|--|
| Asset                                     | Date out of service | Date sold | Selling price/FMV | Trade-in? |  |  |
|   |                     |           | \$                |           |  |  |
|   |                     |           | \$                |           |  |  |
|   |                     |           | \$                |           |  |  |
|   |                     |           | \$                |           |  |  |
|   |                     |           | \$                |           |  |  |
|   |                     |           | \$                |           |  |  |

#### Partnership Business Credits (if you answered Yes for any of the questions below, please provide a statement with details)

□ Yes □ No | Did the partnership pay expenses to make it accessible by individuals with disabilities?

□ Yes □ No | Did the partnership pay any FICA taxes on employee wages for tips above minimum wage?

□ Yes □ No | Did the partnership own any residential rental buildings providing qualified low-income housing?

□ Yes □ No Did the partnership incur any research and experimental expenditures during the tax year?

□ Yes □ No Did the partnership have employer pension plan start-up costs? Total number of employees

□ Yes □ No Did the partnership pay health insurance premiums for employees? Total number of employees

□ Yes □ No | Did the partnership purchase and place in service any electric vehicles or energy efficient commercial building property?

| State Estimated or Pass-Through Entity (PTE) Tax Payments — Tax Year 2024 |        |           |       |        |           |  |  |
|---|--------|-----------|-------|--------|-----------|--|--|
| State   | Amount | Date Paid | State | Amount | Date Paid |  |  |
|   | \$     |           |       | \$     |           |  |  |
|   | \$     |           |       | \$     |           |  |  |
|   | \$     |           |       | \$     |           |  |  |
|   | \$     |           |       | \$     |           |  |  |

#### **Tax Return Preparation**

We will prepare the partnership's tax return based on information provided. In the event the return is audited, you will be responsible for verifying the items reported. It is important that you review the return carefully before signing to make sure the information is correct. Unless otherwise stated, the services for preparation of the partnership's return do not include auditing, review, or any other verification or assurance.

### **Taxpayer Responsibilities**

- You agree to provide us all income and deductible expense information. If additional information is received after we begin working on the return, you will contact us immediately to ensure the completed tax returns contain all relevant information.
- You affirm that all expenses or other deduction amounts are accurate and that you have all required supporting written records. In some cases, we will ask to review documentation.
- You must be able to provide written records of all items included on the return if audited by either the IRS or state tax authority. We can provide guidance concerning what evidence is acceptable.
- You must review the return carefully before signing to make sure the information is correct.
- Fees must be paid before the tax return is delivered to you or filed for you. If you terminate this engagement before completion, you agree to pay a fee for work completed. A retainer may be required for preparation of returns.
- Keep a copy of the tax return and any related tax documents. You may be assessed a fee if you request a duplicate copy in the future.

Signatures. By signing below, you acknowledge that you have read, understand, and accept your obligations and responsibilities.

| Driveey Deliev |       |      |
|----------------|-------|------|
| Taxpayer       | Title | Date |

## **Privacy Policy**

The nature of our work requires us to collect certain nonpublic information. We collect financial and personal information from applications, worksheets, reporting statements, and other forms, as well as interviews and conversations with our clients and affiliates. We may also review banking and credit card information about our clients in the performance of receipt of payment. Under our policy, all information we obtain about you will be provided by you or obtained with your permission.

Our firm has procedures and policies in place to protect your confidential information. We restrict access to your confidential information to those within our firm who need to know in order to provide you with services. We will not disclose your personal information to a third party without your express written permission, except where required by law. We maintain physical, electronic, and procedural safeguards in compliance with federal regulations that protect your personal information from unauthorized access.