

# 2024 Partnership Tax Organizer

General Information				
Business legal name			EIN	
Doing business as		Date business started		Entity type
Street		City		State      ZIP Code
Business activity			Product or service	
Phone		Accounting method: <input type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other _____		
Accounting period: <input type="checkbox"/> Calendar year <input type="checkbox"/> Fiscal year <input type="checkbox"/> Short tax year			Beginning date      Ending date	
Partnership Representative				
Partnership representative			SSN	
Street		City		State      ZIP Code
Email			Phone	
Partners				
Partner name		TIN		Entity type
Street		City		State      ZIP Code
Email			Phone	
Check one: <input type="checkbox"/> General partner or LLC member-manager <input type="checkbox"/> Limited partner or other LLC member			Check one: <input type="checkbox"/> Domestic partner <input type="checkbox"/> Foreign partner      Country of citizenship or organization	
Ownership percentage (BOY)		Capital contributions during the year		Amount paid for health insurance premiums
Ownership percentage (EOY)		Distributions during the year		Guaranteed payments
Partner name		TIN		Entity type
Street		City		State      ZIP Code
Email			Phone	
Check one: <input type="checkbox"/> General partner or LLC member-manager <input type="checkbox"/> Limited partner or other LLC member			Check one: <input type="checkbox"/> Domestic partner <input type="checkbox"/> Foreign partner      Country of citizenship or organization	
Ownership percentage (BOY)		Capital contributions during the year		Amount paid for health insurance premiums
Ownership percentage (EOY)		Distributions during the year		Guaranteed payments

Questionnaire	
<input type="checkbox"/> Yes <input type="checkbox"/> No	Did our firm prepare the 2023 tax return for this business?
<input type="checkbox"/> Yes <input type="checkbox"/> No	Did the business change its legal name?
<input type="checkbox"/> Yes <input type="checkbox"/> No	During the 2024 calendar year, did the partnership have an interest in or a signature or other authority over a financial account in a foreign country?
<input type="checkbox"/> Yes <input type="checkbox"/> No	Did the partnership pay \$600 or more of nonemployee compensation to any individual during the year?
<input type="checkbox"/> Yes <input type="checkbox"/> No	Did or will the partnership file required Form(s) 1099?
<input type="checkbox"/> Yes <input type="checkbox"/> No	At the end of the tax year did any foreign or domestic corporation, partnership, trust, or tax-exempt organization, or any foreign government own, directly or indirectly, an interest of 50% or more in the profit, loss, or capital of the partnership?
<input type="checkbox"/> Yes <input type="checkbox"/> No	At the end of the tax year did any individual or estate own, directly or indirectly, an interest of 50% or more in the profit, loss, or capital of the partnership?
<input type="checkbox"/> Yes <input type="checkbox"/> No	At the end of the tax year, did the partnership own directly 20% or more, or directly or indirectly own, 50% or more of the total voting power of all classes of stock entitled to vote of any foreign or domestic partnership?
<input type="checkbox"/> Yes <input type="checkbox"/> No	At the end of the tax year, did the partnership directly own an interest of 20% or more, or directly or indirectly own, an interest of 50% or more in the profit, loss, or capital in any foreign or domestic partnership or in the beneficial interest of a trust?
<input type="checkbox"/> Yes <input type="checkbox"/> No	Did the partnership have any debt that was canceled, was forgiven, or had the terms modified so as to reduce the principal amount of the debt?
<input type="checkbox"/> Yes <input type="checkbox"/> No	At any time during the tax year, did the partnership (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, or otherwise dispose of a digital asset?

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Income			
Gross receipts or sales	\$	Gross rents	\$
Returns and allowances	\$	Gross royalties	\$
Dividends	\$	Net gain (loss)	\$
Interest	\$	Other income	\$

Cost of Goods Sold (COGS)			
Beginning of year inventory	\$	Other costs	\$
Purchases	\$	End of year inventory	\$
Cost of labor	\$	Inventory method:	

Expenses			
Advertising	\$	Postage and shipping	\$
Automobile expense	\$	Professional education and training	\$
Bad debts	\$	Rent or lease (car, machinery, equipment)	\$
Bank charges	\$	Rent or lease (other business property)	\$
Cleaning and janitorial	\$	Repairs and maintenance	\$
Contract labor	\$	Retirement plans	\$
Dues and subscriptions	\$	Salaries and wages (other than to partners)	\$
Employee benefit programs	\$	Software	\$
Entertainment	\$	Supplies	\$
Guaranteed payments to partners	\$	Taxes (payroll)	\$
Healthcare plans (non-partner employees)	\$	Taxes (local and property)	\$
Insurance (other than health)	\$	Taxes (other)	\$
Interest	\$	Telephone	\$
Internet	\$	Tools	\$
Legal and professional services	\$	Travel	\$
Licenses and permits	\$	Utilities	\$
Meals	\$	Other expenses	\$
Office expenses	\$		

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Balance Sheet			
Assets		Liabilities and capital	
Cash and bank accounts	\$	Accounts payable	\$
Trade notes and accounts receivable	\$	Payables less than one year	\$
Inventories	\$	All nonrecourse loans	\$
Loans to partners	\$	Loans from partners	\$
Mortgages and loans held by partnership	\$	Payables more than one year	\$
Stock, bonds, and securities	\$	Other liabilities	\$
Other assets	\$	Partners' capital accounts	\$
		Retained earnings	\$

Asset Listing (non-inventory assets costing more than \$2,500)					
Complete if acquired, sold, or disposed of during 2024			Complete if sold or disposed of during 2024		
Description of property		Date acquired	Cost	Date sold or disposed	Expenses of sale
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					

