



## 2019 Tax Review Worksheet

**Please upload all of your information to myBBDPass.**

Date \_\_\_\_\_ From: \_\_\_\_\_

Is your review appointment scheduled yet? (Check One)     \_\_\_Yes     \_\_\_No

✓ *YES -- My appointment is scheduled for (Date) \_\_\_\_\_ Time \_\_\_\_\_*

✓ *NO -- What is the best phone number to reach you? \_\_\_\_\_*

	ACTUAL: 1/1/19 to Current Date	ESTIMATED: Current Date to 12/31/19
<b>(+) Gross Income or Sales</b>		
<b>(-) Business Expenses</b> Not including checks written to you.		
<b>(-) Equipment Purchases</b> This should not be included in expenses.		
<b>(=) Profit</b> Before wages, draws, and rents to you.		
<b>(-) Wages to yourself</b> Include any gross wages paid to your through your payroll.		
<b>(-) Draws to yourself</b> Include any checks written to you other than payroll and rent payments.		
<b>(-) Rent Payments to yourself</b>		
<b>Federal Estimated Tax Payments</b> (Not Payroll Taxes)		
<b>State Estimated Tax Payments</b> (Not Payroll Taxes)		

**NOTE: Please include copies of any Year-To-Date Pay stubs for any other income to be reflected on your 2019 personal tax return for you and/or your spouse.**

Other changes or notes for your corporate year beginning January 1st 2019 - December 31st, 2019, please list below: