## PURE ROMANCE TAX ORGANIZER

This tax organizer has been developed to assist you in collecting and summarizing the information needed for your Pure Romance business. The following pages contain many of the common items of income and expenses associated with your business. Please review every item listed as they may apply to your specific situation. The following information will be requested by most tax advisors when filing your tax information.

GENERAL INFORMATION
Consultant name and number:

Address:

Home phone: $\qquad$ Cell: $\qquad$
Work phone: $\qquad$ Fax: $\qquad$
E-mail address: $\qquad$
Social security number: $\qquad$ Date of birth: $\qquad$
What month and year did your join Pure Romance? $\qquad$
You were recruited by: $\qquad$
County in which you live: $\qquad$ School district: $\qquad$
Do you live within the city limits (subject to city income taxes)? Yes $\qquad$ No $\qquad$

SOURCES OF INCOME
*Please be sure to include your official Form 1099-MISC issued by Pure Romance
Total sales for 2011
(Sales before shipping, tax and discounts on customer orders)
\$ $\qquad$
Total shipping income collected
\$ $\qquad$
Total override bonuses plus taxable prizes \& awards received (Box 7 on your 1099-MISC)
\$ $\qquad$

## COST OF GOODS SOLD

2010 Ending inventory value (at your cost) (enter -0- if this was your first year with Pure Romance) $\qquad$
Total retail and net purchases (at your cost)
(from your Pure Romance invoices)
\$ $\qquad$
\$ $\qquad$
Items taken from inventory for personal use
Returns and allowances NOT warrantied back to corp
2011 Ending inventory value (at your cost) as of 12/31/2011
Approximate date ending inventory was taken:
\$ $\qquad$
\$ $\qquad$
$\qquad$

## EXPENSES

## ADVERTISING

Business cards, labels, stationery
\$
Fair booths/Bridal shows
$\qquad$
Film \& film developing
Fliers and newsletters
$\qquad$

Greeting cards
$\qquad$

Newspaper ads
$\qquad$
Prizes and awards
$\qquad$
Promotional tools
$\qquad$
Pure Romance clothing, decals, etc.
Sales literature $\qquad$
Other:
$\qquad$
$\qquad$
$\qquad$
BAD DEBTS: (If originally claimed as sales \& there is reason to believe the debt will never be collected)
Customers' NSF checks
\$
Other bad debts (document \& verify):
$\qquad$

## DUES \& PUBLICATIONS:

Membership in business related organizations \$ $\qquad$
Subscriptions to business publications $\qquad$

## FREIGHT:

UPS/U.S. Postal service mailing charges
$\$$
Shipping paid to Pure Romance (invoices)
$\qquad$
$\qquad$

## INSURANCE

Self-employed health insurance (if applicable) \$ $\qquad$
Business auto insurance
General business insurance
$\qquad$
$\qquad$
INTEREST (business related interest only)
Interest paid on loans for purchasing business
Property, i.e. copier, computer, etc. $\qquad$
Credit card finance interest paid for purchasing business property and/or inventory $\qquad$
LEGAL AND PROFESSIONAL SERVICES

Business related accounting fees
Tax return preparation fees
\$ $\qquad$
$\qquad$
\$ $\qquad$
$\qquad$
$\qquad$
$\qquad$
$\qquad$
$\qquad$
$\qquad$

| Assets purchased (for business use) | \% Pure Romance <br> business use | Purchase date | Purchase price <br> (including sales tax) |
| :--- | :---: | :---: | :---: |
| Computer |  | $/$ |  |
| Copying machine |  | $/$ |  |
| Desk |  | $/$ |  |
| Fax machine |  | $/$ |  |
| File cabinets |  | $/$ |  |
| Printer |  | $/$ |  |
| Shelves |  | $/$ |  |
| Telephone/Answering machine |  | $/$ |  |
| Television/VCR |  | $/$ |  |
| Typewriter |  |  |  |
| Digital or video camera |  |  |  |

## REPAIRS:

Cost of repairing business equipment
\$ $\qquad$

## RETIREMENT PLANS:

I have the following retirement plans established:
$\square$ Individual Retirement Account (IRA)
$\square$ Roth IRA
$\square$ Simplified Employee Pension Plan (SEP)
$\square$ Simple IRA

## SUPPLIES:

Paper products on Pure Romance invoices Baskets
Books, CD's and DVD's
Motivational/Training tapes
Packaging materials
Ribbons and decorative supplies

2011 Amount contributed \$ $\qquad$
$\qquad$
$\qquad$
$\qquad$
\$ $\qquad$
$\qquad$
$\qquad$
$\qquad$
$\qquad$
$\qquad$

Storage, inventory containers
Other miscellaneous supplies:
$\qquad$

TRAVEL:

| BUSINESS TRAVEL: | Annual <br> Convention | Annual <br> Training | Market <br> Training | PR University | Other |
| :--- | :---: | :---: | :---: | :---: | :---: |
| Location | Las Vegas | Cincinnati |  |  |  |
| Transportation |  |  |  |  |  |
| Lodging |  |  |  |  |  |
| Parking, taxis \& tolls |  |  |  |  |  |
| Telephone |  |  |  |  |  |
| Dry cleaning/laundry |  |  |  |  |  |

## MEALS AND ENTERTAINMENT (Including tips):

(Receipt is mandatory if a business meal is over \$75. If a business meal is under \$75, a receipt is not required but the taxpayer is still required to document date, time, place and business purpose, as well as the individual(s) the meal was with). The best advice is to always get a detailed receipt.

| Breakfasts <br> Lunches |  |
| :--- | ---: |
| Dinners <br> Travel meals <br> (Convention, training, etc.) |  |

## TELEPHONE EXPENSES:

Do you have more than one telephone line in your home? $\quad$ Yes $\square$ No
My monthly base telephone rate is \$ $\qquad$
(Only if you have a dedicated Pure Romance telephone line coming into the home)
Total long distance charges $\qquad$ \% related to Pure Romance $\qquad$ \%
(Do not include monthly base rate)
$\qquad$
Do you own a cell phone? Date purchased $\qquad$ Purchase price \$ $\qquad$

Total cell phone charges $\$$
Total internet charges \$
Website fees \% related to Pure Romance $\qquad$ \%
\% related to Pure Romance $\qquad$ \% Voice mail fees \$ $\qquad$

## WAGES:

Wages paid for:
Office assistants/secretarial $\qquad$
\$ $\qquad$ Childcare
(Must provide name, social security number and address of childcare provider below)
SSN/FEIN\#: $\qquad$
$\qquad$
$\qquad$
$\qquad$
Other: $\qquad$
OTHER EXPENSE:
Meeting room fees
Open houses
Total people attending home meetings
Other miscellaneous expenses:
$\qquad$
\$ $\qquad$
$\qquad$
$\qquad$
$\qquad$
$\qquad$
$\qquad$
$\qquad$
$\qquad$
$\qquad$

ESTIMATED TAX PAYMENTS MADE:

|  | Date due | Date paid | Check \# | Federal | State | Local |
| :--- | :--- | :--- | :--- | :--- | :--- | :--- |
| First quarter |  |  |  |  |  |  |
| Second quarter |  |  |  |  |  |  |
| Third quarter |  |  |  |  |  |  |
| Fourth quarter |  |  |  |  |  |  |

## HOME OFFICE EXPENSE

Valuation of your home:
Purchase price
\$ $\qquad$
Value of the land included in the purchase price of your home
\$ $\qquad$
\$ $\qquad$
Cost of improvements to your home
\$ $\qquad$
Percentage your home is used for your business:
Area of home used for business (sq. feet) $\qquad$
Total living area square footage of home $\qquad$
Expenses for business use:
Direct expenses:
Painting of business part of home
\$ $\qquad$
Repairs to business part of home
\$ $\qquad$
Other direct expenses

Indirect expenses (annualized):
Mortgage interest
\$
$\qquad$
\$
-
Real estate taxes
\$ $\qquad$
Insurance (Homeowner's or Renter's)
\$ $\qquad$
Rent (if applicable)
\$ $\qquad$
\$ $\qquad$
Repairs and Maintenance
Utilities:
Electric
\$ $\qquad$
Gas/Oil
\$ $\qquad$

Water \& Sewer

Trash disposal
\$
\$ $\qquad$

## AUTOMOBILE EXPENSES

|  | Car \#1 | Car \#2 |
| :--- | :--- | :--- |
| Do your own or lease your car? | Lease $\square$ Own | ロLease $\square$ Own |
| Year, Model \& Make of car |  |  |
| Date I started driving my auto for business |  |  |
| Total Pure Romance business related miles |  |  |
| Total of ALL mileage driven for months indicated above |  |  |
| ACTUAL EXPENSES: |  |  |
| Gasoline, oil, lubrication, etc. |  |  |
| Repairs |  |  |
| Tires, supplies, etc. |  |  |
| Lease payments (if applicable) |  |  |
| Auto insurance |  |  |
| Tags and licenses |  |  |
| Interest on auto loan (if applicable) |  |  |
| Car washes |  |  |
| Auto club membership fees (ie. AAA) |  |  |
| Parking fees |  |  |
| Tolls |  |  |
|  |  |  |

## QUESTIONS, SUGGESTIONS AND/OR COMMENTS

