

### Auto Expense

Partnership Name: \_\_\_\_\_

EIN: \_\_\_\_\_

#### Auto Expense

Name of activity vehicle is used for \_\_\_\_\_

Description of vehicle \_\_\_\_\_

Date vehicle was placed in service \_\_\_\_\_

Yes No

- Was this vehicle available for personal use during off-duty hours?
- Was the vehicle used primarily by someone with more than 5% ownership or a related person?
- Was another vehicle available for personal use?

Miles the vehicle was driven during 2023	2023 Amount
Business . . . . .	_____
Commuting . . . . .	_____
Other . . . . .	_____

Miles the vehicle was driven in prior years	
Business . . . . .	_____
Total . . . . .	_____

Expenses	2023 Amount	2023 Amount
Garage rent . . . . .	_____	Repairs . . . . . _____
Gas . . . . .	_____	Tires . . . . . _____
Insurance . . . . .	_____	Tolls . . . . . _____
Licenses . . . . .	_____	Lease addback . . . . . _____
Oil . . . . .	_____	Other expenses
Parking fees . . . . .	_____	_____
Rental fees . . . . .	_____	_____
Interest . . . . .	_____	_____
Property tax . . . . .	_____	

Asset Listing for 2023

Partnership Name:

EIN:

Assets for:

Description of Property	Date Acquired	Cost / Basis	Date Disposed of	Sales Price	Expense of Sale

## 2023 Tax Organizer for Partnerships Business Information

### Partnership Information

<b>Partnership's legal name</b>		<b>EIN</b>	
<b>Doing business as name</b>			
<b>In care of name</b>			
<b>Street address, city, state, and ZIP</b>			
<b>Email</b>			
<b>Phone number</b>		<b>Cell number</b>	
<b>Fax number</b>		<b>Date business started</b>	

**Yes**   **No**

Does the partnership file under a calendar year?  
If "No," what is the begin date? \_\_\_\_\_ End date? \_\_\_\_\_

Did the partnership conduct business activities in any state other than the resident state?  
If "Yes," what states? \_\_\_\_\_

Is this the partnership's final year in business?  
What accounting method does the partnership use?  
 Cash     Accrual    Other (describe) \_\_\_\_\_

What is the partnership's principal business activity? \_\_\_\_\_

What product or service does the partnership produce? \_\_\_\_\_

Number of partners at any given time during the year? \_\_\_\_\_

What type of entity is the partnership filing as?

<input type="checkbox"/> Domestic general partnership	<input type="checkbox"/> Domestic limited partnership
<input type="checkbox"/> Domestic LLC	<input type="checkbox"/> Domestic limited liability partnership
<input type="checkbox"/> Foreign partnership	<input type="checkbox"/> Other (describe) _____

### Partnership Representative or Designated Individual (if the representative is an entity)

<b>Representative name</b>			
<b>Street address, city, state, and ZIP</b>			
<b>Phone number</b>		<b>Email</b>	

### Estimates

	Resident State		Resident City	
	Date Paid	Amount	Date Paid	Amount
Overpayment applied from 2022	_____	_____	_____	_____
First quarter	_____	_____	_____	_____
Second quarter	_____	_____	_____	_____
Third quarter	_____	_____	_____	_____
Fourth quarter	_____	_____	_____	_____
Additional payments	_____	_____	_____	_____

### Account Information for Deposits and Withdrawals

Name of Bank	Bank Routing Number	Bank Account Number	Type of Account		Use This Account for	
			Checking	Savings	Deposit	Withdrawal

**Partner Information**

Partnership Name:

EIN:

Partner Name Address City, State, and ZIP	ID Number	Type of Partner Information				Type	Beginning of Year Ownership Percentage		
		If the partner is a disregarded entity provide the partner's TIN and name					Profit	Loss	Capital
		General	Limited	Domestic	Foreign				



**Partner's Capital Account Information**

Partnership Name:

EIN:



<b>Partner Name</b>	<b>Beginning Capital</b>	<b>Gain on Contributed Property</b>	<b>Cash Contributed</b>	<b>Adjusted Basis of Property</b>

Rental Real Estate

Partnership Name:

EIN:

General Property Information

Select the property type

- Single family residence, Multi-family residence, Vacation, Commercial, Land, Royalties, Self-rental, Other

Description of property if the property type is "Other"

Address of property

City, State, ZIP

Foreign province, Country, Postal code

Number of days property was rented, Number of days property was used for personal use

- This property was placed in service during tax year 2023. This property was disposed of during tax year 2023.

Income and Expenses

2023

Table with 2 columns: Expense Category, Amount. Rows include Gross rental or royalty income, Advertising, Auto and travel, Cleaning and maintenance, Commissions, Insurance, Legal and other professional fees, Interest, Repairs, Taxes, Utilities, Wages and salaries, Guaranteed payments for services, Guaranteed payments for capital, Health insurance payments, Meals and entertainment, Other expenses (list).

### Rental Other Than Real Estate

Partnership Name: \_\_\_\_\_

EIN: \_\_\_\_\_

#### General Property Information

Description of property \_\_\_\_\_

Address of property \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

This property was placed in service during tax year 2023.

This property was disposed of during tax year 2023.

#### Income and Expenses

2023

Gross rental income . . . . . \_\_\_\_\_

Advertising . . . . . \_\_\_\_\_

Auto and travel . . . . . \_\_\_\_\_

Cleaning and maintenance . . . . . \_\_\_\_\_

Commissions . . . . . \_\_\_\_\_

Insurance . . . . . \_\_\_\_\_

Legal and other professional fees . . . . . \_\_\_\_\_

Interest . . . . . \_\_\_\_\_

Repairs . . . . . \_\_\_\_\_

Taxes . . . . . \_\_\_\_\_

Utilities . . . . . \_\_\_\_\_

Wages and salaries . . . . . \_\_\_\_\_

Guaranteed payments for services . . . . . \_\_\_\_\_

Guaranteed payments for capital . . . . . \_\_\_\_\_

Other expenses (list)

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_