

Business/Investment Questions

ORG4

	Yes	No
1 Did you receive stock from a stock bonus plan with your employer? (Do not include stock sales included on your W-2.)	<input type="checkbox"/>	<input type="checkbox"/>
2 Did you buy or sell any stocks or bonds in 2016? If yes , attach broker's information (such as Form 1099-Bs and broker annual statements) related to the transactions.	<input type="checkbox"/>	<input type="checkbox"/>
3 Did you surrender any U.S. savings bonds during 2016?	<input type="checkbox"/>	<input type="checkbox"/>
4 Did you use the proceeds from Series EE or I U.S. savings bonds purchased after 1989 to pay for higher education expenses?	<input type="checkbox"/>	<input type="checkbox"/>
5 Did you realize a gain or loss on property which was taken from you by destruction, theft, seizure, or condemnation?	<input type="checkbox"/>	<input type="checkbox"/>
6 Did you start a business, purchase a rental property or farm, or acquire interests in partnerships or S corporations?	<input type="checkbox"/>	<input type="checkbox"/>
7 Do you have any investments for which you were not personally 'at risk' (other than sole proprietorship or farm)?	<input type="checkbox"/>	<input type="checkbox"/>
8 Did you own an interest in a Real Estate Mortgage Investment Conduit (REMIC) during 2016?	<input type="checkbox"/>	<input type="checkbox"/>
9 Did you sell property or equipment on installment in 2016?	<input type="checkbox"/>	<input type="checkbox"/>
10 Did you have any business related educational expenses?	<input type="checkbox"/>	<input type="checkbox"/>
11 Did you do a 'like-kind' exchange of property in 2016?	<input type="checkbox"/>	<input type="checkbox"/>
12 Do you have records, as described below, to support expenses?	<input type="checkbox"/>	<input type="checkbox"/>
Tax law and IRS regulations allow deductions for travel and entertainment if adequate records can be presented. Information must include: 1 Amount; 2 Time and place; 3 Date; 4 Business purpose; 5 Description of gift(s); and 6 Business relationship of recipient.		
13 Did you purchase special fuels for non-highway use?	<input type="checkbox"/>	<input type="checkbox"/>
If yes , please list the type of use and the number of gallons for each fuel.		

14 Was Form 8903 (Domestic Production Activities Deduction) included in your 2015 federal income tax return?	<input type="checkbox"/>	<input type="checkbox"/>

Business Income and Expenses

ORG19

GENERAL INFORMATION

1 Check ownership **Taxpayer** **Spouse** **Joint**

2 Business name

3 a Business street address.....

b 1 City, State and Zip Code, or

2 Foreign country.....

4 Principal business/profession

5 Employer ID number.....

6 Business code (**Preparer Use Only**)

7 Was this business fully disposed of in a fully taxable transaction during 2016 ?..... **Yes** **No**

8 Accounting method:
 Cash Accrual Other (specify)

9 Method used to value closing inventory:
 Cost Lower of Other (explain)

Yes **No**

10 Was there a change in determining quantities, costs, or valuations between opening/closing inventory?
 (If yes, attach explanation)

11 Did you materially participate in the operation of this business during 2016 ?

12 Did you start or acquire this business during 2016 ?

13 a Did you make any payments in 2016 that require you to file Forms 1099?

b If yes, did you or will you file all the required Forms 1099?

14 At-risk determination:
a Is all of the investment in this activity at risk?

b Is some of the investment in this activity not at risk?

15 Did you have unallowed passive losses in 2015 ?

16 a Treat all MACRS assets for this activity as qualified Indian reservation property?

b Treat all assets acquired after August 27, 2005 as qualified GO Zone property?..... **Regular** **Extension** **No**

c Treat all assets acquired after May 4, 2007 as qualified Kansas Disaster Zone property?

d Was this business located in a Qualified Disaster Area?

Complete ORG51 for Asset Acquisitions and ORG50 for Dispositions.

INCOME	2016	2015
17 Gross receipts or sales.....		
18 Returns and allowances plus other adjustments.....		
19 Other income (include federal/state gas tax credit/refund)		

COST OF GOODS SOLD – IF APPLICABLE	2016	2015
20 Inventory at beginning of year		
21 Purchases		
22 Items withdrawn for personal use		
23 Cost of labor (do not include your salary)		
24 Materials and supplies		
25 Other costs		
26 Inventory at end of year.....		

Business Income and Expenses (continued)

ORG19

EXPENSES	2016	2015
Business name _____		
27 Advertising		
28 Car and truck expenses (complete ORG18).....		
29 Commissions and fees		
30 Contract labor		
31 Depletion		
32 Depreciation and Section 179 deduction (Preparer Use Only).....		
33 Employee benefit programs:		
a Employee health insurance premiums		
b Other employee benefit programs		
34 Insurance (other than health)		
35 Self-employed health insurance attributable to this business		
36 Interest:		
a Mortgage paid to banks not reported to you on Form 1098.....		
b Other		
37 Legal and professional services		
38 Office expenses		
39 Pension and profit-sharing plans		
40 Rent or lease:		
a Machinery and equipment (enter vehicle lease on ORG18)		
b Other business property.....		
41 Repairs and maintenance		
42 Supplies (not included in cost of goods sold)		
43 Taxes and licenses not reported to you on Form 1098		
44 Travel, meals, and entertainment:		
a Travel.....		
b Meals and entertainment subject to 50% limit		
c Meals subject to 80% limit.....		
d Meals and entertainment not subject to limit.....		
45 Utilities		
46 Gross wages		
47 Other expenses:		

48 Expenses for business use of your home (Preparer Use Only).....		
Complete ORG20 for Business Use of Home.		
49 Qualified pension plan start-up costs.....		

Business Use of Home

ORG20

for:
copy:

Elect the simplified method instead of entering actual expenses

GENERAL INFORMATION	2016	2015
1 Area used regularly and exclusively for business, regularly and exclusively for day care, or regularly for inventory storage (square footage)		
2 Area used only partly for day care (square footage)		
3 Total area of home (square footage)		
4 Daycare hours		
a Number of weeks used for day care, if less than full year		
b Number of days used for day care each week		
c Number of days closed for holidays, vacations, etc		
d Number of hours used for day care each day		
5 Enter the date you began using this home office for this business		
6 If part of your income is from a place of business other than this home, enter % of gross income from business use of this home		
7 Adjustment to gain from business use of home shown on Schedule D or Form 4797 (Preparer Use Only)		
8 Adjustment to losses from this business shown on Schedule D or Form 4797 (Preparer Use Only)		

Enter expenses that benefit only your business area in the 'Direct' column and expenses that benefit your entire home in the 'Indirect' column.

EXPENSES	2016		2015	
	Direct	Indirect	Direct	Indirect
9 Casualty losses (Preparer Use Only)				
10 Total mortgage interest/points				
11 Mortgage interest/points on Form 1098				
12 Interest not on Form 1098				
13 Points not of Form 1098				
14 Real estate taxes				
15 Excess mortgage interest (Preparer Use)				
16 Qualified mortgage insurance				
17 Other insurance				
18 Rent				
19 Repairs and maintenance				
20 Utilities				
21 Other expenses (e.g., rent)				
22 Carryover of operating expenses				
23 Excess casualty losses (Preparer Use Only)				
24 Depreciation of your home (Preparer Use Only)				
25 Carryover of excess casualty losses and depreciation				

DEPRECIATION

If your home and any additions or improvements to your home are not already listed on ORG50 for this business, please complete the following information.

26	Description	Date Acquired (MM/DD/YY)	Date Placed in Service (MM/DD/YY)	Cost (include land for residence only)
	Residence			
	Addition/Improvement			
	Addition/Improvement			
	Addition/Improvement			
	Addition/Improvement			
27	Enter the land value included in cost for residence			

Sales of Business Property

ORG24

T = Taxpayer, S = Spouse, J = Joint

Attach all copies of 1099-S and 1099-B forms here.

Note: Enter asset dispositions here or on ORG50 (Transferred Assets), but not both.

SALE OF PROPERTY USED IN A TRADE OR BUSINESS AND HELD MORE THAN 1 YEAR
(Include in this table asset dispositions which resulted in long-term loss, and dispositions of raised livestock for long-term gain)

TSJ	Description of Property	Date Acquired	Date Sold	Sales Price	Cost Plus Expense of Sale

SALE OF PROPERTY USED IN A TRADE OR BUSINESS AND HELD 1 YEAR OR LESS
(Include in this table asset dispositions which resulted in short-term gain or loss)

TSJ	Description of Property	Date Acquired	Date Sold	Sales Price	Cost Plus Expense of Sale

GAIN FROM THE SALE OF PROPERTY HELD MORE THAN 1 YEAR (Include in this table dispositions of depreciable trade, business, or residential rental assets which resulted in long-term gain)

TSJ	Description of Property	Date Acquired	Date Sold	Sales Price	Cost Plus Expense of Sale

Depreciation Entry Worksheet

ORG51A

for:

ASSET INFORMATION
Enter vehicles on ORG17 for employees, ORG18 for all others

Description of asset	Percentage of business use..... %
Date placed in service	Section 179 deduction
Cost or basis	Land included in cost.....
Type of asset.....	

Note: Assets placed in service after 1998 use the same recovery period for both regular tax and AMT.

Economic Stimulus – Qualified Property	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Cellulosic Biomass Ethanol Plant Property (CBEPP) - Qualified Property.....	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Qualified Disaster Area – Qualified Property	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Kansas Disaster Zone – Qualified Property	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Gulf Opportunity Zone – Qualified Property	<input type="checkbox"/> Regular	<input type="checkbox"/> Extension	<input type="checkbox"/> No
In service in GO Zone Extension building within 90 days of building.....	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A
Percentage for Special Depreciation Allowance	<input type="checkbox"/> 100% & 50%	<input type="checkbox"/> 30%	<input type="checkbox"/> N/A
Elect OUT of Special Depreciation Allowance.....	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> No
Elect 30% in place of 50% Special Depreciation Allowance.....	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> No
Special Depreciation Allowance.....	AMT Special Depreciation Allowance		

Enter the IRC section under which you amortize the cost of intangibles

Type F: Check if a prior year return amended or Form 3115 filed to change recovery period to 5 years.....

Check if General Asset Account

Prior depreciation..... AMT prior depreciation.....

Info on state depreciation and like-kind exchange property may be entered after transfer to ProSeries 1040.

DISPOSITIONS
Enter business portion only for sales price and expense of sale

Date of disposition.....	Date acquired (if different from Date in service).....		
Report land separately?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Asset	Land
Sales price.....			
Expense of sale.....			
Property type			
Section 179 deduction allowed.....			
If Section 1250:	Additional depreciation after 1975		
	Applicable percentage		%
	Additional depreciation after 1969 and before 1976		
Sale may be linked to Form 6252 or the Home Sale Worksheet after transfer to ProSeries 1040.			
Gain/loss basis, if different	AMT gain/loss basis, if different		
Check to compute personal residence depreciation after May 6, 1997			<input type="checkbox"/>

DETAIL ASSET INFORMATION
This section is calculated for most assets from the data entered above.

Listed property?.....	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Subject to auto limitations?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Truck or van?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Electric passenger vehicle?.....	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
If General Asset Account, number of autos for current year limitation.....			
Heavy SUV?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Eligible Section 179 property (current year assets only)?.....	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Use IRS tables for MACRS property?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Qualified Indian reservation property?.....	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Depreciation type	AMT basis, if different.....		
Asset class	Type for pre-'87 assets		
Depreciation method	AMT depreciation method		
MACRS convention.....			
Year of depreciation			
Recovery period.....	AMT recovery period		
Depreciable basis.....	AMT depreciable basis.....		