

2023 Tax Organizer for Partnerships Business Information

Partnership Information

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

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)

Representative name			
Street address, city, state, and ZIP			
Phone number		Email	

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				Beginning of Year Ownership Percentage		
		General	Limited	Domestic	Foreign	Profit	Loss	Capital

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

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)

Sale of Stock, Real Estate, or Other Property

Partnership Name: _____

EIN: _____

Sale of Capital Assets (including assets not reported on Form 1099-B)

Provide all brokerage statements

Description of Property	Date Purchased	Date Sold	Sales Price	Cost

Installment Sale Income

Description of property _____	2023	Prior Years
Date acquired _____ Date sold _____		
Selling price	_____	
Mortgages assumed	_____	
Cost of property sold	_____	
Depreciation allowed	_____	
Commissions and expense of sale	_____	
Gross profit percentage	_____	
Interest received	_____	
Principal payments received	_____	
Property was sold to a related party <input type="checkbox"/>		

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	Miles the vehicle was driven in prior years	
Business	_____	Business _____
Commuting	_____	Total _____
Other	_____		

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