

Small-Business Tax Organizer

Create a complete annual record package for a sole proprietor or owner-led business without relying on a shoebox of statements.

FREE PDF RESOURCE	Free to view, download, print, and use internally as a general guide.
PUBLIC FORMAT	Watermarked public edition. Editing, assembly, and extraction are disabled in compliant PDF readers.
REUSABLE WORD VERSION	Available when this resource relates to a paid RiskWise engagement.

What this free resource includes

01 Entity and ownership

02 Revenue reconciliation

03 Expense categories

04 Assets and debt

05 Owner activity and missing items

Use the working pages to collect facts, owners, evidence, and dates. Review tax, legal, security, licensing, employment, insurance, or regulatory decisions with the qualified professional appropriate to your facts.

Work through Small-Business Tax Organizer

Record what is known, identify the source, assign an owner, and make missing information visible.

Entity and ownership

Purpose / facts / owner / evidence / date:

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Revenue reconciliation

Purpose / facts / owner / evidence / date:

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Expense categories

Purpose / facts / owner / evidence / date:

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Finish the record and confirm the next step

Complete the remaining sections, then identify what needs review, approval, secure delivery, implementation, or follow-up.

Assets and debt

Purpose / facts / owner / evidence / date:

Owner activity and missing items

Purpose / facts / owner / evidence / date:

Choose the support you need

FREE PDF	Free	Use this public edition as an internal reference or printed working guide.
REUSABLE WORD TEMPLATE	Included	An editable Word version is available when it supports a related paid engagement.
CUSTOM WORK	Scoped	RiskWise can adapt, review, implement, document, or hand off the resource for your business.

Discuss a paid engagement

Call 702-421-1111 or email sales@ezypz.com and mention: Small-Business Tax Organizer

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