



2019 Tax Review Worksheet

Please upload all of your information to myBBDPass.

Date _____ From: _____

Is your review appointment scheduled yet? (Check One) ___ Yes ___ No

✓ *YES -- My appointment is scheduled for (Date) _____ Time _____*

✓ *NO -- What is the best phone number to reach you? _____*

	ACTUAL: 1/1/19 to Current Date	ESTIMATED: Current Date to 12/31/19
(+) Gross Income or Sales		
(-) Business Expenses Not including checks written to you.		
(-) Equipment Purchases This should not be included in expenses.		
(=) Profit Before wages, draws, and rents to you.		
(-) Wages to yourself Include any gross wages paid to your through your payroll.		
(-) Draws to yourself Include any checks written to you other than payroll and rent payments.		
(-) Rent Payments to yourself		
Federal Estimated Tax Payments (Not Payroll Taxes)		
State Estimated Tax Payments (Not Payroll Taxes)		

NOTE: Please include copies of any Year-To-Date pay stubs for any other income to be reflected on your 2019 personal tax return for you and/or your spouse.

Other changes or notes for your corporate year beginning January 1st 2019 - December 31st, 2019, please list below: