

## 2020 Tax Review Worksheet

Please upload this worksheet and supporting documents to myBBDPass.

Please include copies of any Year-To-Date pay stubs for any other jobs you and/or your spouse had in 2020.

Name: \_\_\_\_\_ Current Date: \_\_\_\_\_

Company Name: \_\_\_\_\_

Check the Box if you received any of the following in 2020:

Payroll Protection Program Loan (PPP) If checked, Amount: _____	Unemployment Compensation If checked, Amount: _____
Other State/County/Local Grant If checked, Amount: _____	EIDL Loan If checked, Amount: _____

If you use QuickBooks please upload a backup copy of your file and only fill out column B of this worksheet.

To fill out worksheet:

**In Column A** – Enter actual YTD Numbers – Example: January 1, 2020 to October 31, 2020.

**In Column B** – Enter your projected numbers for the remainder of the year – Example: November 1, 2020 to December 31, 2020. Do not enter amounts for the entire year.

	COLUMN A	COLUMN B
	ACTUAL: 1/1/20 to Current Date	ESTIMATED: Current Date to 12/31/20
(+) Gross Income or Sales		
(-) Business Expenses <small>Not including checks written to you.</small>		
(-) Equipment Purchases <small>This should not be included in expenses.</small>		
(=) Profit <small>Before wages, draws, and rents to you.</small>		
(-) Wages to yourself <small>Include any gross wages paid to you through your payroll.</small>		
(-) Draws to yourself <small>Include any checks written to you other than payroll and rent payments.</small>		
(-) Rent Payments to yourself		
Federal Estimated Tax Payments (Not Payroll Taxes)		
State Estimated Tax Payments (Not Payroll Taxes)		



4916 Lincoln Drive  
Edina, MN 55436

MYBBD.COM

FAX 952.392.1201

OFFICE 952.392.1200