

**Tax Mastery for Small Business
Meeting Prep Form**

| | |
|-------------------------------------|--|
| Company Name | |
| Contact Name | |
| Spouse Name | |
| Type of Entity | |
| Principal Product or Service | |

(S Corp, Corp, Sole Proprietor, Partnership)

| | |
|----------------------------------|--|
| Expected (actual) Revenue | |
| 2022 | |
| 2023 | |
| 2024 | |

| | |
|------------------------------------|--|
| Expected Net Profit or Loss | |
| 2022 | |
| 2023 | |
| 2024 | |

| | |
|--|--|
| Your Wages (W2) from this Business | |
| Spouses Wages (W2) from this Business | |

(Not applicable if Sole Proprietor)