

2024 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?
 Domestic general partnership Domestic limited partnership
 Domestic LLC Domestic limited liability partnership
 Foreign partnership 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 2023	_____	_____	_____	_____
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

2024

Partner Information

Partnership Name:

EIN:

Partner Name Address City, State, and ZIP	ID Number	Type of Partner Information				Beginning of Year Ownership Percentage			
		If the partner is a disregarded entity provide the partner's TIN and name							
		General	Limited	Domestic	Foreign	Type	Profit	Loss	Capital

Asset Listing for 2024

Partnership Name:

EIN:

Assets for:

Description of Property	Date Acquired	Cost / Basis	Date Disposed of	Sales Price	Expense of Sale

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

Table with 5 columns: Description of Property, Date Purchased, Date Sold, Sales Price, Cost. Multiple rows for data entry.

Installment Sale Income

Description of property _____

Date acquired _____ Date sold _____

Table for installment sale income with columns for 2024 and Prior Years. Rows include Selling price, Mortgages assumed, Cost of property sold, Depreciation allowed, Commissions and expense of sale, Gross profit percentage, Interest received, and Principal payments received.

Property was sold to a related party