



Deductions Total Sheet for Business, Self-Employed, 1099, or Contract Work

This is a recommendation of how to organize your receipts. Please keep 100% of your receipts for your records.

Provide this Total Sheet to Nichole at your Tax Appointment

Name of the Business _____

Description/Type of business/service _____

EIN or TAX ID number for the business _____

What year did you start your business? _____

*****If you have more than one business, please print and fill out this sheet for each business.*****

Year/Make/Model of the vehicle used

Total miles put on the vehicle for the year _____

Total business miles put on the vehicle _____

Year/Make/Model of the vehicle used (please add second vehicle if necessary)

Total miles put on the vehicle for the year _____

Total business miles put on the vehicle _____

Total:

Advertising (business cards, flyers, facebook ads) _____

Automotive (oil changes, car repairs, general maintenance) _____

Business Name Renewal _____

Car Wash _____

Client Gifts (any gifts purchased that went to a client or prospecting client) _____

Clothing (this category is clothing for personal everyday wear) _____

Conference/Education/Continuing Education (classes, conventions, or online courses) _____

Contract Labor _____

Depreciation Items (any items that cost you over \$50 and can last for over one year):

Description of Depreciation Item	Date of Purchase	Purchase Amount
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

***Continue on bottom of this document if you have more depreciation items.

Dining (any on the go or sit down meals/coffee with clients or potential clients where business transactions occurred or was discussed):

Business Dining - _____

Personal Dining - _____

Donations (giving or tithing to charitable organizations) _____

Domains _____

Entertainment _____

Equipment / Tools / other _____

Event Costs (booth/room rental, etc.) _____

Fuel (these receipts are need as proof of backup for your mileage log) _____

Groceries (separate personal groceries from business. Business groceries would include any groceries used for business events):

Personal Groceries - _____

Business/Event Groceries - _____

Income (all sources):

1099 NEC _____
1099 MISC _____
W2 Income _____
Additional Income (income made in cash, check, paypal, venmo, etc.) _____
Other _____

Insurance:

Auto Insurance _____
Home Insurance _____
Business Insurance _____
Health Ins out of pocket _____

Internet _____

Legal / Professional Fees (tax preparation fees, lawyer fees, etc.) _____

Lodging (Hotels, AirBnb's, VRBO, etc.) _____

License Renewal _____

Memberships:

Hobby memberships _____
Online business memberships _____
Any other professional memberships _____

Office Equipment & Supplies (paper, printer ink/toner, folders, organizers, etc) _____

Office in Home:

Total Square Feet of the Home _____
Square Feet of office space plus square feet of the restroom used during work _____
Utilities _____
HOA dues _____
Water/Sewer/Trash _____
Home Insurance _____
Property Taxes _____
Home Mortgage Monthly Payment _____
Monthly Rent _____

Personal Items (you do not need to total this category, this will be for your personal use)

Phone and/or Cell Phone Bill _____

Postage / Shipping _____

Rent and/or Home Mortgage _____

Product Purchases _____

Transportation:

 Car rental _____

 Uber/Taxi/Lyft/shuttles, etc. _____

Travel (Flights and Bag Fees) _____

Uniforms (any clothing deemed necessary for work) _____

If you own/have a rental (this can a single room rental in the home or a separate property:

 Description of the property (is this an Airbnb, a room in your home, a property, give as much description as possible here _____

 Address of the property _____

 Total Square feet of the property _____

 How long has it been a rental property _____

 How many days was it rented _____

 How many days was it available for rent _____

 Rental Income _____

 Cleaning costs _____

 Maintenance/Repairs _____

 Property Taxes _____

 Home Insurance _____

 What did you pay for the property _____

 How many years have you owned the property _____

 Upgrades to the property _____

 HOA dues _____

 Please provide the Mortgage Int Statement with your tax documents

 Year/Make/Model of the vehicle used to travel back and forth to the rental

 Total Miles put on the vehicle for the year _____

Total business miles

Custom Categories:

Extra Notes:

