

Tax Receipts Form

Own a Business or have a 1099? Side Gig? This list is a recommendation of how to organize your receipts! You must have physical receipts for your record. Bank statements do not count as legal purchase receipt documents for tax purposes.

VERY IMPORTANT: PLEASE CALCULATE A TOTAL FOR EACH CATEGORY AND BRING JUST THE TOTALS SHEET TO YOUR APPOINTMENT

- Advertising
- Automotive
- Event Costs
- Car Wash
- Client Gifts
- Clothing
- Conference / Education / Continuing Education
- Depreciation Items
- Dining – Separate personal from professional
- Donations
- Entertainment
- Equipment/ Tools/ Other things required for work
- Fuel – These receipts are needed to back up your mileage log
- Groceries—Separate Business / Personal
- Income—All sources
- Insurance- Health, Auto, Other
- Legal/Professional Fees – (Tax preparer, lawyer, etc.)
- Lodging—Hotels, AirBnb's, etc.
- Memberships – all hobbies and professional memberships.
- Miscellaneous
- Office Equipment - Printers, Electronics, Calculators, etc.
- Office Supplies
- Personal Items
- Phone and/or Cell Phone – including all accessories
- Postage/Shipping
- Rent/Home Payment – (ask your preparer about an Office in Home)
- Product/ Inventory
- Transportation-- Car Rentals, Taxi, Uber, Bus, Shuttles, etc.
- Travel - Flights, Bag Fees, etc.
- Uniforms – Clothing deemed necessary for work
- COMPLETE A MILEAGE LOG! Total your personal miles and your business miles.