

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

### 1. Auto Travel

- \_\_\_\_\_ Between jobs or job locations (mi.)
- \_\_\_\_\_ Client meetings (mi.)
- \_\_\_\_\_ Continuing education (mi.)
- \_\_\_\_\_ Job seeking (mi.)
- \_\_\_\_\_ Out of town business trips (mi.)
- \_\_\_\_\_ Purchasing job supplies & materials (mi.)
- \_\_\_\_\_ Professional society meetings (mi.)
- \$ \_\_\_\_\_ Parking fees
- \$ \_\_\_\_\_ Tolls
- \$ \_\_\_\_\_ Other: \_\_\_\_\_

### 2. Travel – Out of Town

- \$ \_\_\_\_\_ Airfare
- \$ \_\_\_\_\_ Bus & subway
- \$ \_\_\_\_\_ Bridge & highway tolls
- \$ \_\_\_\_\_ Car rental
- \$ \_\_\_\_\_ Laundry
- \$ \_\_\_\_\_ Lodging (do not combine with meals)
- \$ \_\_\_\_\_ Meals (do not combine with lodging)
- \$ \_\_\_\_\_ Parking
- \$ \_\_\_\_\_ Porter, bell captain
- \$ \_\_\_\_\_ Taxi
- \$ \_\_\_\_\_ Telephone
- \$ \_\_\_\_\_ Train
- \$ \_\_\_\_\_ Other: \_\_\_\_\_

### 3. Professional Fee & Dues

- \$ \_\_\_\_\_ Association dues
- \$ \_\_\_\_\_ Licenses
- \$ \_\_\_\_\_ Other: \_\_\_\_\_

### 4. Continuing Education

- \$ \_\_\_\_\_ Correspondence course fees
- \$ \_\_\_\_\_ Course registration
- \$ \_\_\_\_\_ Materials & supplies
- \$ \_\_\_\_\_ Photocopy expense
- \$ \_\_\_\_\_ Reference material
- \$ \_\_\_\_\_ Seminar fees
- \$ \_\_\_\_\_ Textbooks
- \$ \_\_\_\_\_ Other: \_\_\_\_\_

### 5. Equipment Purchases

- \$ \_\_\_\_\_ Answering machine
- \$ \_\_\_\_\_ Calculator
- \$ \_\_\_\_\_ Copy machine
- \$ \_\_\_\_\_ FAX machine
- \$ \_\_\_\_\_ Pager
- \$ \_\_\_\_\_ Telephone
- \$ \_\_\_\_\_ Other: \_\_\_\_\_

### 6. Telephone Expenses

- \$ \_\_\_\_\_ Cellular calls
- \$ \_\_\_\_\_ FAX transmissions
- \$ \_\_\_\_\_ Paging service
- \$ \_\_\_\_\_ Pay phone
- \$ \_\_\_\_\_ Toll calls
- \$ \_\_\_\_\_ Other: \_\_\_\_\_

### 7. Supplies & Expenses

- \$ \_\_\_\_\_ Advertising
- \$ \_\_\_\_\_ Bank Charges
- \$ \_\_\_\_\_ Bookkeeping
- \$ \_\_\_\_\_ Business Meals (enter 100%)
- \$ \_\_\_\_\_ Business Cards
- \$ \_\_\_\_\_ Clerical Service

### 8. Business Development

- \$ \_\_\_\_\_ Business Meals and Entertainment
- \$ \_\_\_\_\_ Promotional Items
- \$ \_\_\_\_\_ Sporting/Theater tickets

I understand this worksheet provides a way for me to organize my deduction information only. Whether or not an item is listed on this worksheet is not necessarily an indicator of whether or not an item is deductible. Tax regulations change often and specific circumstances may determine whether or not any item is relevant to my situation. This worksheet cannot substitute for tax knowledge or professional tax advice.