

ACCURATAX CHECKLIST

Please check the items you provide to Accuratax

Business Questions

Name of Business _____

EIN or Social Security Number _____

Business Product or Service _____

__ Date started business _____

__ Income for the year _____

__ Advertising _____

__ Contract Labor _____

__ Payroll & Payroll Taxes _____

__ Office expenses _____

__ Rent or Leases paid _____

__ Taxes & Licenses _____

__ Travel expenses _____

__ Meals with Employees _____

__ Meals with Clients _____

ENTERTAINMENT - As of 2018 Entertainment is no longer deductible.

__ Gifts to Clients (Limit is \$25 per client) _____

__ Interest or Penalties on any loans or credit cards for business. _____

__ Legal & Professional expenses _____

__ Cell phone or Business phone expenses (reasonable % for Business) _____

__ Internet (reasonable % used for Business) _____

__ Repairs and Maintenance _____

__ Tools _____

__ Materials _____

__ Insurance expense (Business Insurance Only) (Medical Premiums seperately) _____

VEHICLE EXPENSES - Any vehicle expenses need miles log.

__ Vehicle Year and Model _____

__ Purchase Price _____

__ Date vehicle put in business _____

__ Odometer reading beginning of year and end of year _____

__ (Miles Method) Business miles driven / Personal miles driven _____

__ (Actual Expenses Method)-(Gas, Oil, Insurance, License, Maintenance) _____

NOTE: NEED TO USE MILES FOR EITHER METHOD.

HOME OFFICE EXPENSE

__ Full House square footage _____

__ Home Office square footage _____

__ House Market Value at time business started _____

__ Land value at time business started _____

__ Cost of any major improvements to property this year _____

__ Utilities (Gas, Electric, Trash) _____

__ House Insurance _____

__ Rent paid _____

AccuraTax LLC Tax and Bookkeeping

Phone (970) 310-5232 Fax (970) 479-1673

todd@accurataxllc.com www.accurataxllc.com