

**This form is ONLY a checklist for businesses. Provide additional documentation. Example: P&L Statement.
(ACCURATAX WEBSITE HAS A P&L Statement you can use)**

Name of Business _____

EIN or Social Security Number _____

Describe Business _____

How many years have you owned business _____

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 CLIENTS/EMPLOYEES (100% if in restaurants for 2022)

Meals at Meetings WITH EMPLOYEES (100%)

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

Interest or Penalties on loans or credit cards for business.

Legal & Professional expenses

Cell phone or Business phone (Percentage for Business)

Internet (reasonable % used for Business)

Repairs and Maintenance

Tools and/or Material expenses

Insurance expense (Business Insurance Only)

Medical Insurance (Medical Premiums are deductible if self
employed and you nor your spouse has ACCESS to employee
insurance through a W2 job)

Other Expenses

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, Insurance, License, Maintenance)

Need miles driven for the business if personal vehicle.

HOME OFFICE EXPENSE

Full House square footage

Home Office square footage

House Market Value (Generally this is Purchase Price)

Cost of any major improvements to property this year

Mortgage Interest or Rent

Property Taxes

Property Insurance

Utilities (Gas, Electric, Trash)

NOTES: _____

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