

Employee Expenses Organizer

Tax Year:

This checklist is to be used as a guide and starting point for documenting job related expenses that are not reimbursed by your employer. This organizer may not include all potential expenses. If you have additional expenses, not included on the organizer that you feel could be used when preparing your income tax return, please document those in the NOTES section and discuss these with your tax preparer.

Certain IRS rules must be met in order to deduct job related expenses. Per the IRS, the expenses must be required to carry out job related functions and not be reimbursed by your employer. In addition, to deduct the expenses, the expenses must exceed 2% of your adjusted gross income (AGI).

Please verify the information for accuracy as this information will be included on your tax return that will be submitted to the IRS. Additionally, it is the responsibility of the tax payer to collect and retain all supporting documentation for your files.

Please bring the completed organizer with you to your appointment. Should you have additional questions, feel free to contact us by email: dollartax@dollarincometax.com or phone: 404-753-8048.

Employee Name:		DOB:	
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Company Name:			
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Company Address:		Office Phone:	
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City, State, Zip		Type of Business:	
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Expenses	Yearly Total	Notes:
Cell Phone:		
Professional Subscriptions:		
Professional Dues:		
In-Home Office:		<i>Complete In-Home Office Organizer. Document total.</i>
Job Search Expense:		
Licenses/Certifications:		
Malpractice Premiums:		
Medical Exam(s):		
Passport:		When required for business trip
Tools:		
Supplies:		
Union Dues:		
Dry Cleaning:		
Work Clothes/Uniforms:		
Educational Seminar:		
Continuing Education:		
Mileage (meetings, 2 nd job)		<i>Primary commute not deductible. Provide mileage documentation.</i>
Auto Rental:		<i>(Complete Vehicle and Auto Organizer)</i>
Parking Fees/Tolls:		
Other:		
Other:		
Other:		

Preparer Notes:		
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Reviewed by:		Date:	
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