

BUSINESS INCOME & PERSONAL DEDUCTION STATEMENT

NAME _____ **TAX YEAR** _____

BUSINESS INCOME	
CASH	\$ _____
CHECKS	\$ _____
1099-K	\$ _____
1099-NEC	\$ _____
_____	\$ _____
TOTAL	\$ _____
BUSINESS EXPENSES	
Rent	\$ _____
Advertising	\$ _____
Supplies	\$ _____
Insurance	\$ _____
Taxes	\$ _____
Utilities	\$ _____
Phone	\$ _____
Repairs	\$ _____
Trash	\$ _____
Fees	\$ _____
Office exp.	\$ _____
Interest	\$ _____
Maintenance	\$ _____
Meal & Ent.	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
COGS	\$ _____
TOTAL	\$ _____
VEHICLE EXPENSES	
Bus. miles	_____
Personal miles	_____
Tolls and Parking	\$ _____
Gas, repair, insurance	\$ _____
_____ / _____ / _____	

Primary Personal homes / deductions/ credits	
\$ 1st loan interest	_____ / _____
\$ 2nd loan interest	_____ / _____
\$ Property tax	_____ / _____
\$ Property tax	_____ / _____
\$ All DMV registrations	_____ / _____ / _____
\$ Check donations	_____
\$ Non-Cash donations	_____
\$ Medical expenses if over 7.5% AGI	_____

\$ Self-employed Health insurance	_____
\$ College tuitions (1098-T + books and supplies)	
\$ Childcare expenses (\$ paid & Tax ID of providers)	
\$ Healthcare /Covered California (need 1095-A)	
\$ _____	
\$ _____	
\$ Student loan interest	\$ _____
\$ Est. taxes paid : US/ \$ _____ CA/ \$ _____	
\$ _____	
\$ SEP/IRA contributions	_____

IMPORTANT !

Please bring all your W2,1099-R, 1095-A

Tuition Statements 1098-T

Unemployment / Gambling income (1099-G)

Stock brokers statements, (Consolidated Statements)

New dependent Social Security Number Card

Bank account number for direct deposit / withdraw

And anything letters, document may be relevant.....

MAJOR PURCHASES / REMODELS (Bring receipts)	
\$ _____	\$ _____
Business miles _____ X .545 = \$ _____	

I ATTEST THE INFORMATION ABOVE IS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE AND I HAVE WRITTEN RECORDS OR RECEIPTS TO SUPPORT THE INCOME AND EXPENSES.

SIGNATURE _____ DATE _____