

Tax Matters



2052 Newport Blvd., Suite 6, Costa Mesa, California 92627-7158

BUSINESS PROFESSIONALS DEDUCTIONS

Client:

ID#:

Tax Year:

The purpose of this worksheet is to help you organize your tax deductible business expenses and **maximize your deductions.**

In order for an expense to be deductible, it must be considered an "ordinary and necessary" expense. You may include other applicable expenses. Do not include expenses for which you have been reimbursed, expect to be reimbursed, or are reimbursable.

Advertising

	Bulk Rate Fees
	Business Cards
	Customer Lists
	Delivery Services for flyers, etc.
	Magazines
	Mailing Lists
	Newspaper
	Postage - flyers, mailers, etc.
	Printing
	Radio
	Signs
	Stationery & Envelopes
	Television
	Web Site Advertising
	Yellow Pages
	Other
	Other
	TOTAL

Commissions & Fees

	Casual Labor
	Clerical Services
	Referral Fees
	Other
	Other
	Other
	TOTAL

Employee Benefit Programs

	Benefits (not Pension & Profit-Sharing)
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Insurance

	E & O Insurance
	Health
	Ins - not health
	Liability
	Umbrella Policy
	Other
	Other
	TOTAL

Interest

	Business Debt
	Mortgage
	Other
	Other
	TOTAL

Legal & Professional

	Accounting Fees
	Association Dues
	Business Credit Card Annual Fee
	Dues - Professional Societies
	Legal Fees
	Memberships
	Notary Fees
	Outside Services
	Professional Services
	Publications
	Resumes
	Trade Books & Journals
	Union Dues
	Web Site Development
	Other
	Other
	TOTAL

Office Expenses

	Office Supplies
	Photocopying
	Postage - not advertising
	Water Delivery
	Other
	Other
	TOTAL

Pension & Profit-Sharing

	Pension
	Profit-Sharing
	Other
	TOTAL

Rent or Lease

	Equipment
	Other Business Property

Repairs & Maintenance

	Repairs
	Carpet Cleaning
	Cleaning Services
	Equipment Repairs
	Maintenance
	Pest Control
	Service Contracts
	Other
	TOTAL