

Tax Matters



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VEHICLE, TRAVEL & ENTERTAINMENT EXPENSE

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.

Vehicle Expense	
	Description of Vehicle
	Date Placed in Service
	Odometer Reading 1/1
	Odometer Reading 12/31
	Total Miles
	Business Miles
	Commuting Miles
	Daily Average Round Trip Commute
	Personal Miles
	Vehicle Leased?
	Vehicle Owned?
	Vehicle Depreciated in Prior Year
	Gas, Lube, Oil
	Repairs & Maintenance
	Tires
	Towing
	Parking & Tolls
Other Information	

Vehicle Expense	
	Insurance
	Auto License/Registration
	Personal Property Tax
	Lease Payments
	Interest
	Auto Club
	Warranty
	Smog Certificate
	Other
	Other
	TOTAL
Travel & Entertainment Expense	
	Airfare & Train
	Car Rental & Gas
	Dry Cleaning
	Entertainment
	Lodging
	Meals
	Parking & Tolls
	Taxi, Bus Shuttles
	Telephone
	Tips
	Other
	Other
	Other
	Number of Days Out of Town
	TOTAL

Tax planning & tax forecasting services for individual and small business clients is a core competency of Tax Matters. Effective tax minimization begins with long-term tax strategizing to establish overall objectives and is maintained with conscientious and consistent annual tax forecasting and mid-year tax planning.

Member of National Society of Enrolled Agents, California Society of Enrolled Agents, National Association of Tax Professionals, Director of Orange County Chapter of Enrolled Agents. 14th Year Preparing Federal & State Business & Personal Income Tax Returns.

Catherine M. Patel

Enrolled Agent

Real Estate Broker

Masters in Business Administration