

# Tax Worksheet for W2 employees in AL, AR, CA, HI, IA, MN, MS & NY

Try your best to fill this out. Use actual amounts (do not round off to the hundred). Not sure where something goes? Don't worry, every expense, except meals, is deducted at the same rate. If it goes in the wrong category it will not affect the bottom line. Any field left blank will be assumed 0 value by our team.

<b>Your Name:</b>	
Which job do these expenses relate to?	
<b>BUSINESS AUTO MILEAGE (only deductible if you kept track of your mileage)</b>	
Make & Model of Auto:	
Date you began using it for business:	
Business Miles driven:	
Personal Miles driven this year – (REQUIRED): We can't take the auto deduction without this number:	
Interest paid on auto loan this year:	\$
If you believe you would benefit from the deduction of <b>actual</b> auto expense and you kept all receipts for gas, car washes, etc. (please don't send them to us) instead of the mileage deduction please check here <input type="checkbox"/> that you'd like to talk about it.	
<b>BUSINESS TRAVEL</b>	
Airfare	
Lodging	
Meals while away from home (if using per diem rate enclose list of cities and how many nights there)	
Bus, train, taxi, parking, tolls	
<b>BUSINESS EXPENSES</b>	
Advertising (Website, Business cards, Marketing, etc.)	
Commissions & fees you paid	
Office Expense (ink, paper, etc.)	
Rent of <input type="checkbox"/> machinery/instruments <input type="checkbox"/> storage <input type="checkbox"/> studio/office space	
Repairs/Maintenance	
Supplies (supplies unique to your business, i.e. acupuncture needles)	
Taxes & Licenses	
Meals (\$ spent on potential clients)	

Internet	
Cell Phone bill for the year	
Cell Phone – what % was business use:	%
Training, Cont. Ed., Conferences	
Trade Publications, Subscriptions	
Postage/Shipping	
Memberships, Dues	
Client Gifts	
Promotional Items	
Local Transportation, Parking/Tolls	
Uniform Purchase/Maintenance (i.e. dry cleaning of lab coat, scrubs, etc)	

<b>HOME OFFICE (Only if space is exclusively used for business and your employer doesn't offer you a work space)</b>	
Square feet used for business: <input type="checkbox"/> Use the same sq. feet as last year	
Total square footage of home <input type="checkbox"/> Use the same sq. feet as last year	
Total utilities (electric, gas, H <sub>2</sub> O, garbage)	
\$ spent specifically on the office space	
<i>For renters:</i> Rent (total for the year)	
<i>For renters:</i> Renter's Insurance	
<i>For homeowners:</i> Mortgage Interest	
<i>For homeowners:</i> Property Taxes	
<i>For homeowners:</i> Insurance	
<i>For homeowners:</i> \$ spent on repairs/improvements to entire home	

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