

TAXSTAR

5-Minute Tax Questionnaire

Self-Employed and Employee Business Expenses Supplemental Questionnaire

INSTRUCTIONS: In order to find every deduction, credit and tax benefit you are entitled to, please answer the following questions regarding your income, reimbursements, deductions expenses, etc.

| | | | | | | | |
|----|---|--|--------------------------|--|--|---|----------------|
| 1 | Vehicle Expenses | Make | Year | <input type="checkbox"/> Original vehicle cost \$ or <input type="checkbox"/> monthly lease or rental cost \$ | | | |
| 2 | Date vehicle placed in service for business purposes: | Was depreciation taken in previous years? <input type="checkbox"/> No <input type="checkbox"/> Yes How much? \$ | | | | | |
| 3 | Total number of miles you drove your vehicle during 2004: | | | | | | |
| | Average daily roundtrip commuting distance | | Total commuting distance | | | | |
| | Business | Personal/Other | Total | | | | |
| 4 | Do you or your spouse have another vehicle available for personal use? <input type="checkbox"/> Yes <input type="checkbox"/> No | | | | | | |
| 5 | Was your vehicle available for use during off-duty hours? <input type="checkbox"/> Yes <input type="checkbox"/> No | | | | | | |
| 6 | Was vehicle sold in 2004 <input type="checkbox"/> No <input type="checkbox"/> Yes | | | Price | Do you have written evidence to support your deduction? <input type="checkbox"/> Yes <input type="checkbox"/> No | | |
| 7 | Gasoline/oil | Repairs | Insurance | Parking/ tolls/ etc | | | |
| 8 | Profit or Loss From Business | Name | | | Address | | |
| 9 | Income: | Gross receipts or sales | | Returns & allowances | | Purchases less items withdrawn for personal use | |
| | | Beginning inventory | Ending inventory | Labor costs | Materials/ supplies | Other costs | |
| 10 | Expense: | Advertising | Bad debts | Commissions | Depreciation | Insurance | Interest |
| | | Legal & professional fees | Office expenses | Pension plan | Rent or lease – machinery/ etc | Repairs/ maintenance | Supplies |
| | | Taxes, licenses, permits | Travel | Meals & entertainment | Lodging | Telephone | Utilities |
| | | Medical insurance premium | Wages | Business related seminars, courses, videos, etc. | | | Other expenses |
| 11 | Employee Business Expenses | Union dues | | | Hand tools | | |
| | Business Gifts | Moving expenses | | | Job-hunting expenses | | |
| | Uniforms/ work clothes | Cleaning & laundering | | | Association dues | | |
| | Computers/ office equipment | | | Bond costs | | Conventions | |
| | Books used on the job | Job agency fees | | | Home office expenses | | |
| | Teachers: Expenses | | | Other | | | |