

TAXSTAR

5-Minute Tax Questionnaire

Truck Drivers 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.

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|-------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------|
| 1 | Are you: <input type="checkbox"/> Independent (self employed) <input type="checkbox"/> Leased driver <input type="checkbox"/> Company employee driver <input type="checkbox"/> Other | | |
| 2 | Total miles on the road for 200__ | In: <input type="checkbox"/> High <input type="checkbox"/> Low <input type="checkbox"/> Average cost area | |
| 3 | Total number of days away from home overnight in 200__ | | |
| 4 | Other costs or expenses in addition to per diem (meals, lodging and incidentals) | | |
| 5 | Total amount of above reimbursed by employer | | |
| 6 | Cost of rig for independent/self employed drivers, when purchased, and depreciation taken since date of purchase. | | |
| 7 | If leased vehicle, monthly lease payments | Total for year | |
| 8 | If independent/self employed, total of all operating expenses | | |
| 9 | Did you pay any estimated tax during 200__ | Federal | State |
| 10 | Did you receive a state income tax refund last year <input type="checkbox"/> Yes <input type="checkbox"/> No | Amount | |
| 11 | Did you itemize deductions last year <input type="checkbox"/> Yes <input type="checkbox"/> No | File Schedule C last year <input type="checkbox"/> Yes <input type="checkbox"/> No | |
| 12 | Alimony paid in 200__ | Name | SS# Amount |
| Use the following questions as a guide to discovering overlooked expenses and deductions | | | |
| 13 | Casual labor to help load/unload | 14 | Rental of hand trucks and other equipment |
| 15 | Fax and duplicating fees | 16 | Parking fees for personal auto or truck |
| 17 | Agent or broker fees for trips, loads, etc. | 18 | Maps, books, log books, special forms, etc. |
| 19 | Snow and ice removal from vehicle, parking and loading areas, etc. | 20 | Tax return preparation fee, accounting and legal fees, etc. |
| 21 | Medical insurance premium plus all other premiums if independent/self employed | 22 | Business related seminars, courses, videos, etc. |
| 23 | Physical exams, eye and hearing tests, etc. | 24 | Operators license or other license or permit |
| 25 | Gloves, caps, rags, coveralls, boots and other special clothing. | 26 | Ice, dry ice, tarps, insulation covers, blankets and other cargo protections. |
| 27 | Flashlights, batteries, keys, pencils, pens, coin dispensers, etc. | 28 | Auto expenses if personal auto is used on the job. |
| 29 | Tips or fees paid to security guards or police to watch rigs parked in unsecured areas. | 30 | All other items related to work, being away from home, and being on the road. |
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