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Business Expenses Incurred in the Production of Income

Client name _____

TAX YEAR: _____

Social Security Number or Tax ID _____

Health Insurance Paid by You: _____

Please provide name of individual plan _____

Income

| W-2 Income Total | Contract/1099 Income Total |
|---------------------|-------------------------------|
| _____ | _____ |

Expenses

Please specify if your work expense is for a W-2 job or 1099/contract job. We will take the calculations from there.

| | W-2 Expense Total | Contract/1099 Expense Total |
|-------------------------------------|----------------------|--------------------------------|
| Advertising (flyers/business cards) | _____ | _____ |
| Showcase Expenses | _____ | _____ |
| Photography | _____ | _____ |
| Website Maintenance/ Hosting | _____ | _____ |
| Resumes | _____ | _____ |

**W-2 Expense
Total**

**Contract/1099 Expense
Total**

Job Search - Identify

Bookkeeper Fees

Tax Preparation

Legal Fees

Business Registration

Licenses - Identify

Prof. Memberships (other than union)

Unions (Identify)

Insurance (describe policy)

Seminar Fees (don't include other costs)

Special Instruction (please identify)

Employment Related Education Expenses
(Describe nature/purpose of this expense)

**W-2 Expense
Total**

**Contract/1099 Expense
Total**

Research & References (specify type)

Space/Studio/Office (**NOT PART OF YOUR HOME**)

Lease/Rent

Utilities (**Not including Phone or Internet**)

Truck Rental

Equipment Rental

Rental - Other (Give brief description)

Storage for Business Purposes

IMPORTANT NOTE: The first telephone line into your home cannot be deducted for business purposes. Only a second, dedicated business land line can. For cell phone: see below:

Dedicated Business Telephone Line Total

Cell Phone Total

AND

Business Use % / Personal Use %

_____ / _____

_____ / _____

Internet Total

AND

Business Use % / Personal Use %

_____ / _____

_____ / _____

| | | |
|---|------------------------------|--|
| Fax | _____ | _____ |
| Postage/ Mail Delivery/ PO Box Rental | _____ | _____ |
| | W-2 Expense Total | Contract/1099 Expense Total |
| Printing & Typesetting Charges | _____ | _____ |
| Freight Service | _____ | _____ |
| Protective Clothing/Uniforms w/logo (Can't be used as "normal street wear") | _____ | _____ |
| Gifts (Not to exceed \$25 per person/ per married couple per year) | _____ | _____ |
| Business Credit Card/ Bank Fees & Interest IMPORTANT NOTE: The deduction is not allowed if there is any personal usage on acct!!! | _____ | _____ |
| Other Interest Expense | _____ | _____ |
| Supplies - (Supplies generally have a life use of less than 1 year) | | |
| Office Supplies | _____ | _____ |
| Other Supplies (Give brief description) | _____ | _____ |
| _____ | _____ | _____ |
| Small Equipment/Tools - Costing \$200 or less per item NOTE: Equipment generally has a life use of more than 1 year | | |
| Please provide total amount spent: | _____ | _____ |
| Computer Software (Less than \$200) | _____ | _____ |

Computer Software (Costing \$200 or more) Please provide the following:

| Purchase Date | Software Name | Amount Paid |
|----------------------|----------------------|--------------------|
|----------------------|----------------------|--------------------|

Large Equipment (costing \$200 or more) - For Each Item, Provide the Following:

| Purchase Date | Make/Model | Amount Paid |
|----------------------|-------------------|--------------------|
|----------------------|-------------------|--------------------|

Large Equipment Disposed or No Longer Used - For Each Item, Provide the Following:

| Disposal Date | Item Description | Method of Disposal (sale, donated, discarded) |
|----------------------|-------------------------|--|
|----------------------|-------------------------|--|

Improvements to Equipment

Please give description of improvement

Repair/Maintenance of Equipment:

Computer and Electronic Peripherals (Costing \$200 or more)

Please note % of how much you use for work (WK) and how much you use for personal (PS)

| Purchase Date | Make/Model | Amount Paid | WK % - PS % |
|---------------|------------|----------------------|--------------------------------|
| <hr/> | | | |
| <hr/> | | | |
| | | W-2 Expense Total | Contract/1099 Expense Total |

Contract Work (Paid each contractor less than \$600 in the year)

* Contract Work (Paid \$600 or more to contractor in year)

* Did you issue them 1099's as required?

_____ YES / NO

_____ YES / NO

Please contact us if you need 1099's issued

Business Meals

Business Meals - LOCAL ONLY - Do not include meals while traveling here - list those on your travel expense worksheet. Business meals are for generating income. Keep receipts/ or journal on who you met with and nature of business discussed. Keep for your records. Just provide us with a total amount you paid for local business meals.

Travel Expenses:

Please use our travel worksheet to detail those expenses

Auto Expenses:

Please use our auto worksheet to detail those expenses

Office in Home Deduction:

Please use our Office in Home worksheet to detail those expenses