

Tax Prep Checklist for Computer & High-Tech Professionals

Filing your business tax returns can be very complicated and overwhelming. This checklist will let you know what you need and help you get organized. This list will help us do our job. It is a concise, though not exhaustive, outline of some of the documents we will need when we meet with you.

Professional Fees and Dues

- Association Dues
- Credentials
- Professional Associations
- Other: _____

Continuing Education

- Correspondence Course Fees
- Course Registration
- Documentation
- Materials & Supplies
- Photocopy Expenses
- Reference Material
- Research Expenses
- Seminar Fees
- Textbooks
- Other: _____

Communication Expenses

- FAX Transmissions
- Paging and Cellular Service
- Internet Access (cable, DSL, etc)
- Other: _____

Auto Travel (In Miles)

- Between Jobs or Locations
- Client Meetings
- Continuing Education
- Job Seeking
- Out of Town Business Trips
- Purchasing Job Supplies & Materials
- Professional Society Meetings
- Parking Fees and Tolls (\$)
- Other: _____

Supplies & Expenses

- Briefcase & Laptop Case
- Business Meals (enter 100% of expenses)
- Business Cards
- Clerical & Bookkeeping Service
- Computer Software
- Computer Supplies
- Customer Lists & Database Costs
- Entertainment (enter 100% of expense)
- Equipment Repair
- Development Costs
- Client Gifts & Greeting Cards
- ISP & Internet Access
- Legal & Professional Services
- Office, Stationery & Fax Supplies
- Website Development Costs
- Postage & Shipping
- Sub-contractor Labor
- Networking Expenses
- Technical Publications (documentation)
- Other: _____

Equipment Purchases

- Notebook Computer
- FAX Machine, PDA & Copier
- Pager, Personal Assistant & Cellular Phone
- Desktop Computers & Printers
- Modems and Computer Peripherals
- Other: _____

Travel – Out of Town

- Airfare
- Parking and Tolls
- Lodging (do not combine with meals)
- Meals (do not combine with lodging)
- Porter, Bell Captain & Laundry
- Telephone Calls (including home)
- Other: _____