

Tax Prep Checklist for Medical 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.

Supplies & Expenses

- Answering Machine
- Bag – Medical
- Beeper – Pager
- Computer & Printer
- Business Cards & Briefcase
- Business Meals (enter 100% of expenses)
- Medical Equipment
- Office Supplies
- Recorder & Tapes
- Referral Service
- Repairs – Equipment
- Stationery
- Other: _____

Continuing Education

- Correspondence Course Fees
- Lab Fees
- Materials & Supplies
- Photocopy Expenses
- Reference Material
- Registration Fees
- Transcripts
- Tuition
- Textbooks
- Other: _____

Professional Fees & Dues

- Alumni Dues
- Medical Association Dues
- Professional Association Dues
- Union Dues
- Other: _____

Uniforms & Upkeep

- Alterations
- Shoes
- Cleaning
- Hat, Cap
- Jacket, Pants & Scrubs
- Laundry & Cleaning
- Other: _____

Telephone Expenses

- Answering Service
- Cellular Service
- Paging Services
- Pay Phone
- Toll Calls
- On-line Charges
- Other: _____

Auto Travel (in miles)

- Between Medical Facilities
- Continuing Education
- Interviews – Position
- Out of Town Business Trips
- Patient House Calls
- Purchasing of Equipment & Supplies
- Tolls & Parking (\$)
- Other: _____

Travel – Out of Town

- Airfare, Train & Bus
- Car Rental
- Parking
- Taxi & Subway
- Lodging (do not combine with meals)
- Meals (do not combine with lodging)
- Porter, Bell Captain
- Laundry
- Bridge & Highway Tolls
- Telephone Calls (including home)
- Other: _____

Other Expenses

- Malpractice & Liability Insurance
- Journals – Medical
- Legal fees (protection & production of taxable income)
- Periodicals – Medical
- Professional Subscriptions
- Other: _____