

Tax Prep Checklist for Outside Salespeople

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

- Advertising
- Bank Charges
- Bookkeeping
- Business Meals (enter 100% of expense)
- Business Cards & Printing
- Clerical Services & Software
- Entertainment (50% deductible)
- Data Base & Sales Lead Lists
- Equipment Repair
- FAX Supplies
- On-line Service Charges
- Gifts & Greeting Cards
- Legal & Professional Services
- Office Expenses
- Photocopy Expense
- Postage
- Rent
- Shipping
- Trade Publication & Map Book
- Other: _____

Professional Fees & Dues

- Association Dues
- License
- Union Dues
- Other: _____

Educational Costs

- Correspondence Course Fees
- Course Registration
- Materials & Supplies
- Photocopy Expense
- Reference Material
- Textbooks & Seminar Costs
- Motivational Taps
- Other: _____

Equipment Purchases

- Answering Machine
- Calculator
- FAX Machine
- Pager & Telephone
- Computer & Printer
- Other: _____

Telephone Expenses

- Cellular Phone Charges
- FAX Transmissions
- Paging Service
- Pay Phone
- Toll Calls
- Other: _____

Auto Travel (Mileage)

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

Travel (out of town)

- Airfare
- Car Rental
- Parking & Tolls
- Taxi
- Train
- Bus & Subway
- Lodging (do not include meals)
- Meals (do not include lodging)
- Porter, Bell Captain
- Laundry
- Telephone
- Other: _____

Miscellaneous

- Liability Insurance – Business
- Books & Magazine Subscriptions
- Professional Subscriptions
- Other: _____