

Tax Prep Checklist for Teachers and Education 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 & Dues

- Alumni Dues
- Association Dues
- Credentials
- Parent/Teacher Groups
- School & Union Dues
- Other: _____

Classroom Supplies

- Arts & Crafts Materials
- Audio Visual Rentals
- Audio Visual Supplies
- Books & Music
- Classroom Decorations
- Computer Software
- Film & Processing
- Grading Expenses
- On-line Services
- Computers & Printers
- Newspapers & Magazines
- Paper, Stationery & Printing
- Party Supplies
- Photocopy Expense
- Records, Tapes, etc.
- Student Prizes & Awards
- Trophies
- Visual Aids
- Video Tapes
- Other: _____

Continuing Education

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

Auto Travel (In Miles)

- Away from Home Overnight
- Between Jobs or Locations
- Continuing Education
- Field Trips
- Library Trips
- Meetings
- Purchasing Job Supplies & Materials
- Professional Society Meetings
- School Functions
- Seminars
- Parking Fees & Tolls (\$)
- Other: _____

Travel – Out of Town

- Airfare
- Car Rental
- Parking
- Taxi & Train
- Bus & 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: _____

Telephone Expenses

- FAX Transmissions
- Pager
- Pay & Toll Calls
- Cell Phone
- Other: _____

Miscellaneous Expenses

- Liability Insurance – Business
- Periodicals
- Professional Subscriptions
- Resume
- Other: _____