PROFESSIO	NAL / ATT	ORNEY / ACCOUNTANT	TAXPAYER	SPOUSE
BUSINESS INCOME -	- 1099, cash, Pa	ypal, Venmo (not W2 or brokerage)		
ADVERTISING – bus	. cards, website			
CONTRACT LABOR -		oor, assistants		
INSURANCE – busine				
INTEREST – paid on	•	· · · · · · · · · · · · · · · · · · ·		
•	•	aration, accounting, legal		
		e, UPS, FedEx, messengers		
REPAIRS – compute				
SUPPLIES – paper, b				
TELEPHONE – cell ph				
TRAVEL – airfare, ho				
MEALS – business m				
COURT FILING FEES	icais, traili			
	IDTIONS Descri	Doy Adobo Microsoft Office		
	·	Box, Adobe, Microsoft Office		
		, seminars, workshops		
		r dues, license renewal		
PROMOTIONAL – cli	ent gifts			
RESEARCH				
	· · · · · · · · · · · · · · · · · · ·	ags, books, newspaper subscriptions		
EQUIPMENT & SOFT	WARE PURCHA	SES – total		
FEDERAL INCOME T	AX PAYMENT –	extension, estimated tax		
STATE INCOME TAX	<b>PAYMENT</b> – ext	ension, estimated tax		
RETIREMENT CONTE	RIBUTION – SEP,	IRA, Roth IRA		
MEDICAL INSURANCE	Œ			
MEDICAL EXPENSE				
REAL ESTATE TAX				
MORTGAGE INTERE	ST			
CHARITY – cash, che				
,		Goodwill, Salvation Army, Out of The Closet		
HOME OFFICE		VEHICLE EXPENSE	VEHICLE 1	VEHICLE 2
BUS. USE SQ FT		YEAR ACQUIRED & TYPE		
TOTAL SQ FT		TOTAL MILEAGE ADDED THIS YEAR		
INSURANCE		BUS. MILEAGE ADDED THIS YEAR		
RENT		PARKING		
REPAIRS		GASOLINE OR APPROX MILES PER GAL.		
UTILITIES		REPAIRS, TIRES, TUNE-UPS		
		INSURANCE		
		REGISTRATION/DMV		
		LEASE EXPENSE		

BUSINESS EQUIPMENT PUR		Four Digits SS# <u>*</u>	
Date Purchased (mm/dd/yyyy)	Description		Cost
			total
CHECK LIST:			
☐ Make sure all names	are exactly as they appear on the	Social Security cards	i.
☐ Subtotal all your rece	eipts and write the totals in the ap	propriate categories	
☐ Bring all W-2s and 10	99s with you.		
☐ If == -	hring in all information including	g date and price of p	urchase and sale.
☐ IT you sold any stocks	s, brillig ili ali ililorillation, iliciuulli	8 aace and price of p	
	urity numbers are included for all		es).
	urity numbers are included for all		rs).
☐ Make sure Social Sec☐ Fill out the following	urity numbers are included for all		s).
☐ Make sure Social Sec	urity numbers are included for all		rs).
☐ Make sure Social Sec☐ Fill out the following	urity numbers are included for all		zip
☐ Make sure Social Sec☐ Fill out the following	urity numbers are included for all	children (dependent	
☐ Make sure Social Sec ☐ Fill out the following  Address:  City  Phone: home	urity numbers are included for all:	children (dependent	
☐ Make sure Social Sec ☐ Fill out the following  Address:  City	urity numbers are included for all:	children (dependent	
☐ Make sure Social Sec ☐ Fill out the following  Address:  City  Phone: home	urity numbers are included for all:	children (dependent	
☐ Make sure Social Sec ☐ Fill out the following  Address:  City  Phone: home	urity numbers are included for all:	children (dependent	
☐ Make sure Social Sec ☐ Fill out the following  Address:  City  Phone: home	urity numbers are included for all:	children (dependent	
☐ Make sure Social Sec ☐ Fill out the following  Address:  City  Phone: home  email:	work	State cell	Zip
☐ Make sure Social Sec ☐ Fill out the following  Address:  City  Phone: home  email:	urity numbers are included for all:	State cell	Zip
☐ Make sure Social Sec ☐ Fill out the following  Address:  City  Phone: home  email:	work	State cell	Zip
☐ Make sure Social Sec ☐ Fill out the following  Address:  City  Phone: home  email:	work work directly to hnr@hnrclark.	State cell cell	Zip
☐ Make sure Social Sec ☐ Fill out the following  Address:  City  Phone: home  email:	work	State cell cell	Zip

ESTIMATED FED REFUND \_\_\_\_\_ ESTIMATED STATE REFUND \_