



**Uhart Tax & Financial**

*Helping YOU Achieve Financial Success!*

**TAX DEDUCTIONS FOR  
BUSINESS PROFESSIONAL**

Use this form to summarize and organize your tax-deductible business expenses. In order to deduct expenses in your trade or business, you must show that the expenses are "ordinary and necessary." An ordinary expense is one, which is customary in your particular line of work. A necessary expense is one, which is appropriate, but not necessarily essential in your business. The application of these terms to you relies heavily on the "facts and circumstances" of your unique situation. A business expense deduction must also take into account any reimbursement you have received, or could have received for that expense from your employer or another source. Please also use the auto expense worksheet and/or office in the home worksheet if applicable.

Auto Travel	
Client Meetings (Local) (mi)	
Client Meetings (out of town) (mi)	
Continuing Education (mi)	
Out of Town Business Trips (mi)	\$
Parking Fees & Tolls	
Other: _____	

Travel – Out of Town	
Airfare	\$
Bus, Shuttle, Subway, Taxi, or Train	
Bridge & Highway Tolls	
Car Rental	
Laundry	
Lodging (do not combine with meals)	
Meals (do not combine with lodging)	
Parking	
Porter, Bell Captain	
Telephone Calls (including home)	
Other: _____	

Professional Fees & Dues	
Notary Fees	\$
Chamber of Commerce	
Professional Fees & Dues	
Union Dues	
Other: _____	

Telephone Expenses	
Cellular Service	\$
Fax Transmissions	
Internet	
Payphone	
Telephone/Pager	
Other: _____	

Continuing Education	
Correspondence/Course Fees	\$
Materials, Supplies & Textbooks	
Other: _____	

Equipment Purchases*	
Answering Machine	\$
Calculator	
Cell Phone	
Computer Equipment/Printer	
Copy Machine	
Fax Machine	
Pagers	
Recorder	
Telephone	
Other: _____	

Supplies & Expenses	
Advertising	\$
Answering Service	
Bank Service Charges	
Briefcase	
Business Cards & Letterhead	
Business Meals (100% of expense)	
Clerical Service	
Computer Software & Supplies	
Consultants	
Employment Seeking Expenses	
Entertainment/Promotion	
Equipment Repair	
Equipment Replacement	
Fax Supplies	
Insurance	
Gifts, Cards & flowers	
Legal & Professional Services	
Office Expenses	
Office Rental Expense	
Photocopy Expenses	
Postage/FedEx/Courier services	
Publications/Subscriptions	
Referral Fees	
Rent	
Security Clearance Expenses	
Utilities	
Website Expenses	
Other: _____	

\*Please list equipment purchases over \$200 on the back of this sheet, with the date placed in service and cost.