

Please bring the following basic information

Required Information

- W-2s
- 1099s
- Interest Paid
- Interest Earned
- Property Tax Paid
- DMV Oaid
- Stock & Dividend Information
- Partnership K-1s
- Settlement Statements on house or any real estate purchase For homebuyers credit signed HUD
- Charitable Contributions, Cash/Non-Cash, Volunteer Miles
- Medical Insurance
- Out Of Pocket Medical
- Moving Expenses

Each category should include all sources of payment, cash check or charge  
For Home Office

- Rent
- Utilities
- Security
- Renter Insurance
- Repairs
- Cleaning, If over \$1600 may need to file employment forms please ask

Auto Information

- Insurance
- DMV
- Repairs
- Mileage And Dates
- Gas
- AAA, Car Washes
- Auto Lease, and Rent
- Oil Change Receipts

Equipment Purchased

- Description
- Date Purchased
- Cost

Office Furniture Purchased

- Description
- Date Purchased
- Cost

Travel

- Where Went
- Dates
- Purpose
- # Days Away
- Trainee Log

- Appointment Book

Each category should include all sources of payment, cash check or charge

Example Categories A-O

- Accounting
- Advertising
- Agent
- Business gifts, Limited to \$25 per person per year
- Cable, Seperate Premium Channels
- Classes
- Coaching
- Contest entrance fees
- Copyright registration
- Directory listing
- Player directory
- Domain/web server
- Dues subscriptions
- Education/acting
- Film & Developing
- Film festival fees
- Headshots
- Insurance-Equipment
- Insurance-liability
- Internet
- Legal
- Manager
- Meals Business
- Meetings & Seminars
- Memberships
- Messenger/delivery
- Movies, Tape Rentals, Theater Tickets
- Office supplies
- Online Service fees
- Options
- Outside service

Each category should include all sources of payment, cash check or charge

Example Categories O-Z

- Pager
- Parking (Meter & Valet)
- P O Box rental
- Portfolio/resume
- Postage
- Printing
- Professional Library
- Promotion
- Publicity
- Rent-Equipment
- Rent-Rehearsal
- Rent-Studio
- Rent-Theatre
- Repairs-Equipment
- Research/archiving
- Small equipment/tools/kit
- Special wear/gear
- Software
- Storage-work related
- Telephone-fax
- Telephone-cell
- Telephone-home
- Transportation-local
- Travel, Air, Hotel, Train, Ship, Car Rental, Shuttle, Tips
- Travel, dry cleaning
- Wardrobe & make-up (performers)
- Work boots
- Union dues