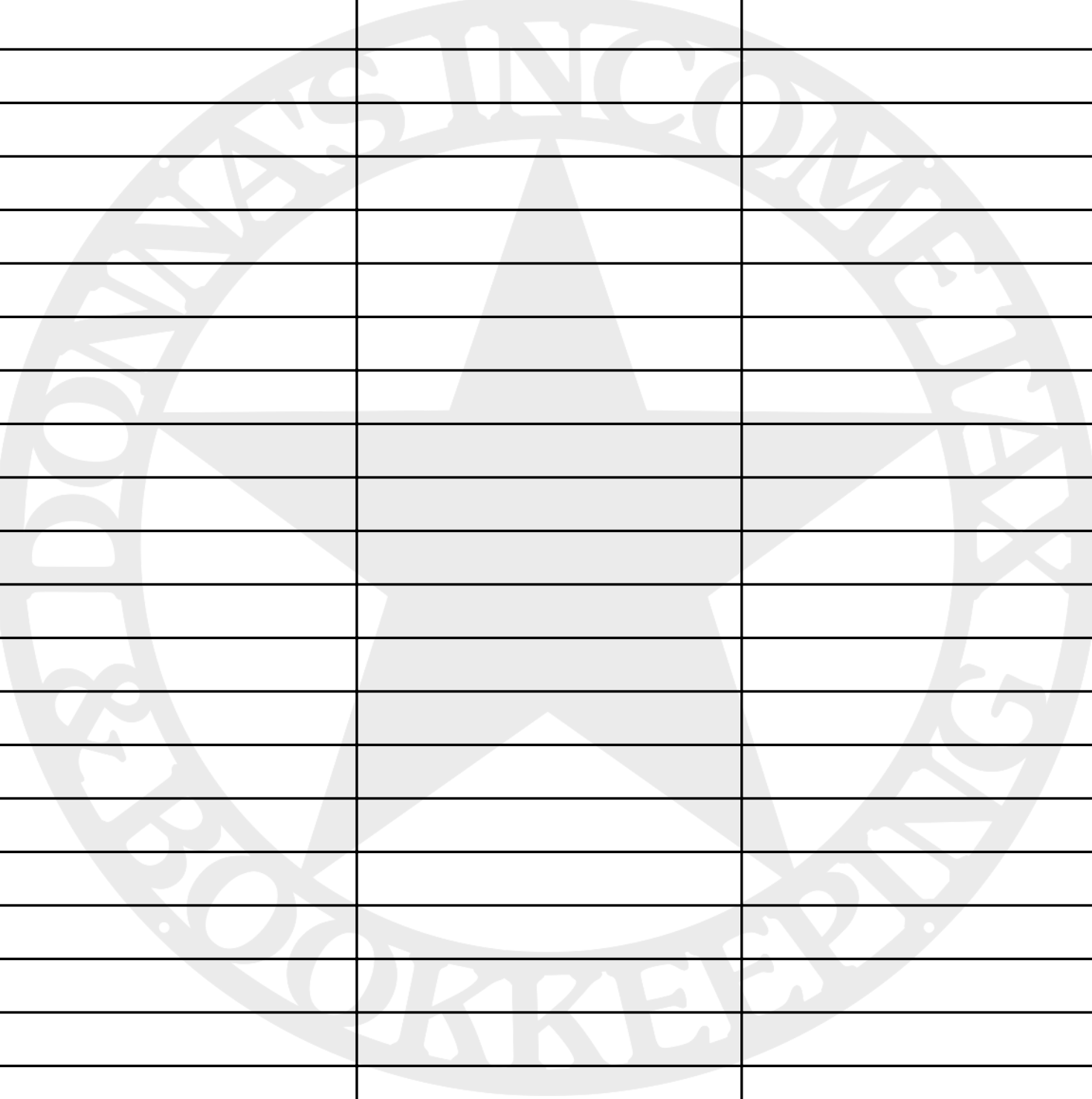




TAX
PLANNER

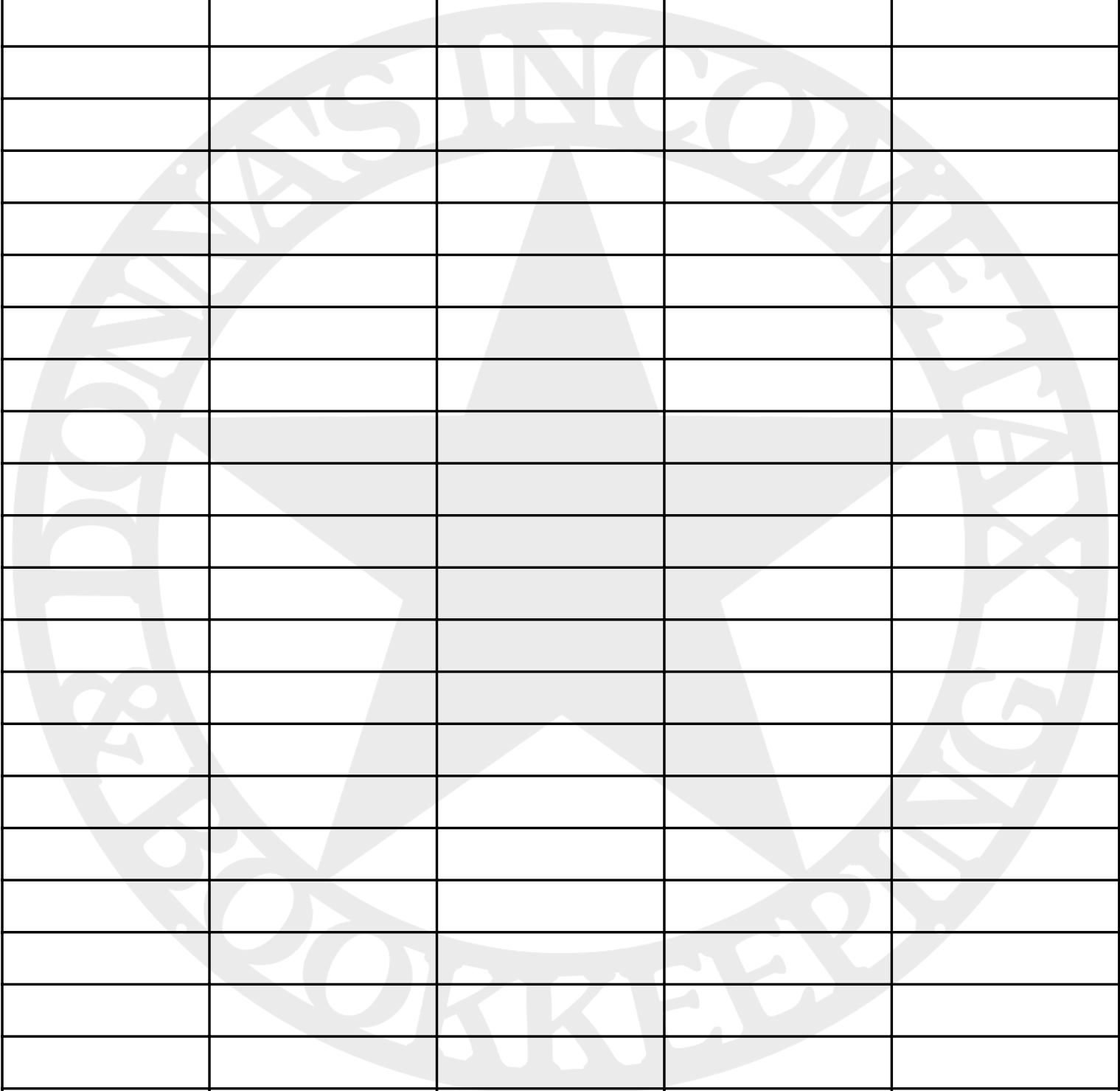
VEHICLE TRACKER

Vehicle ID	Mileage	Repairs



TUITION

Issued to	School Name	EIN	Tuition Amount	Awards

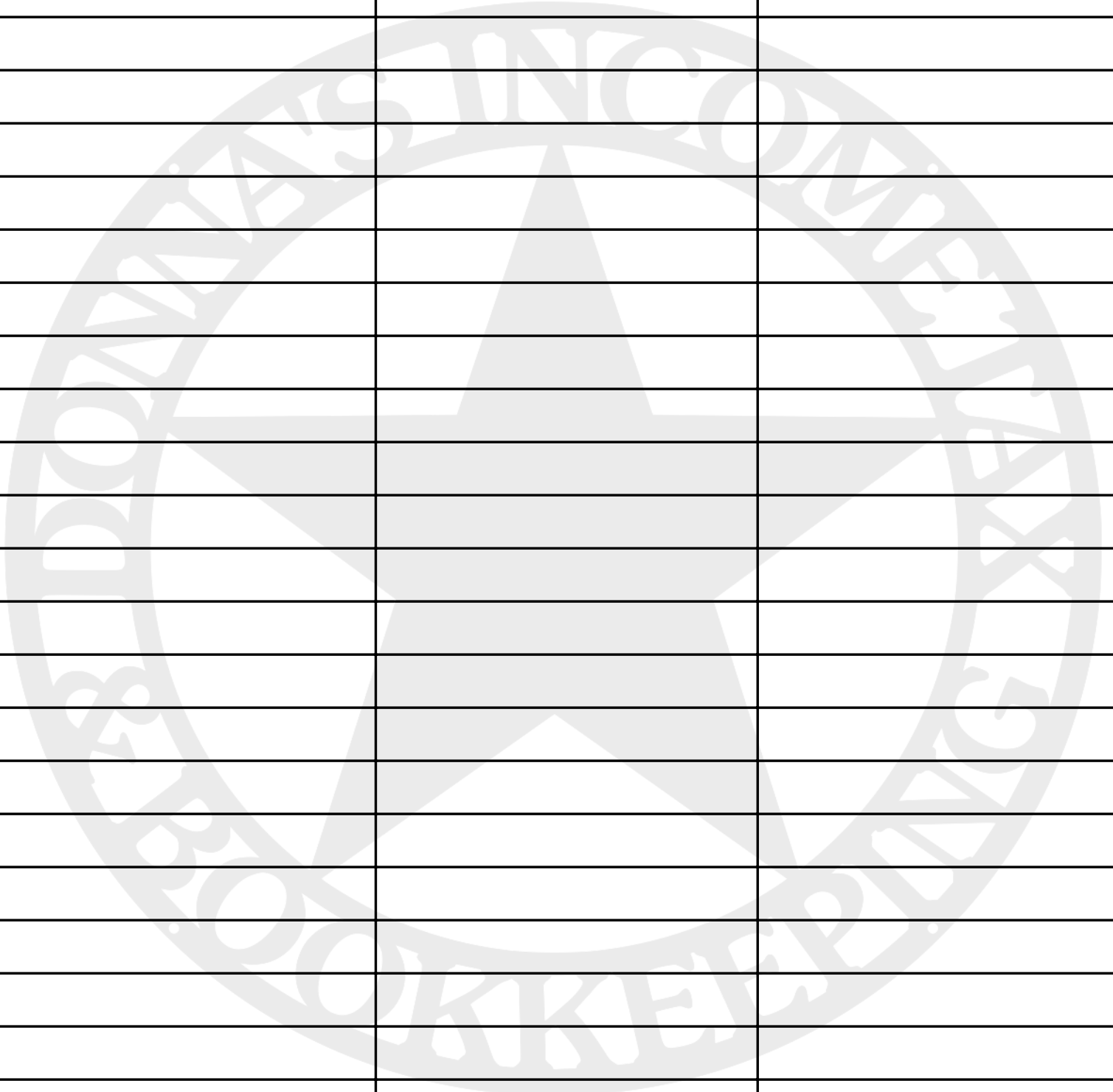


EDUCATION EXPENSES

Student's Name	Amount

Student's Name	Amount

MEDICAL EXPENSES

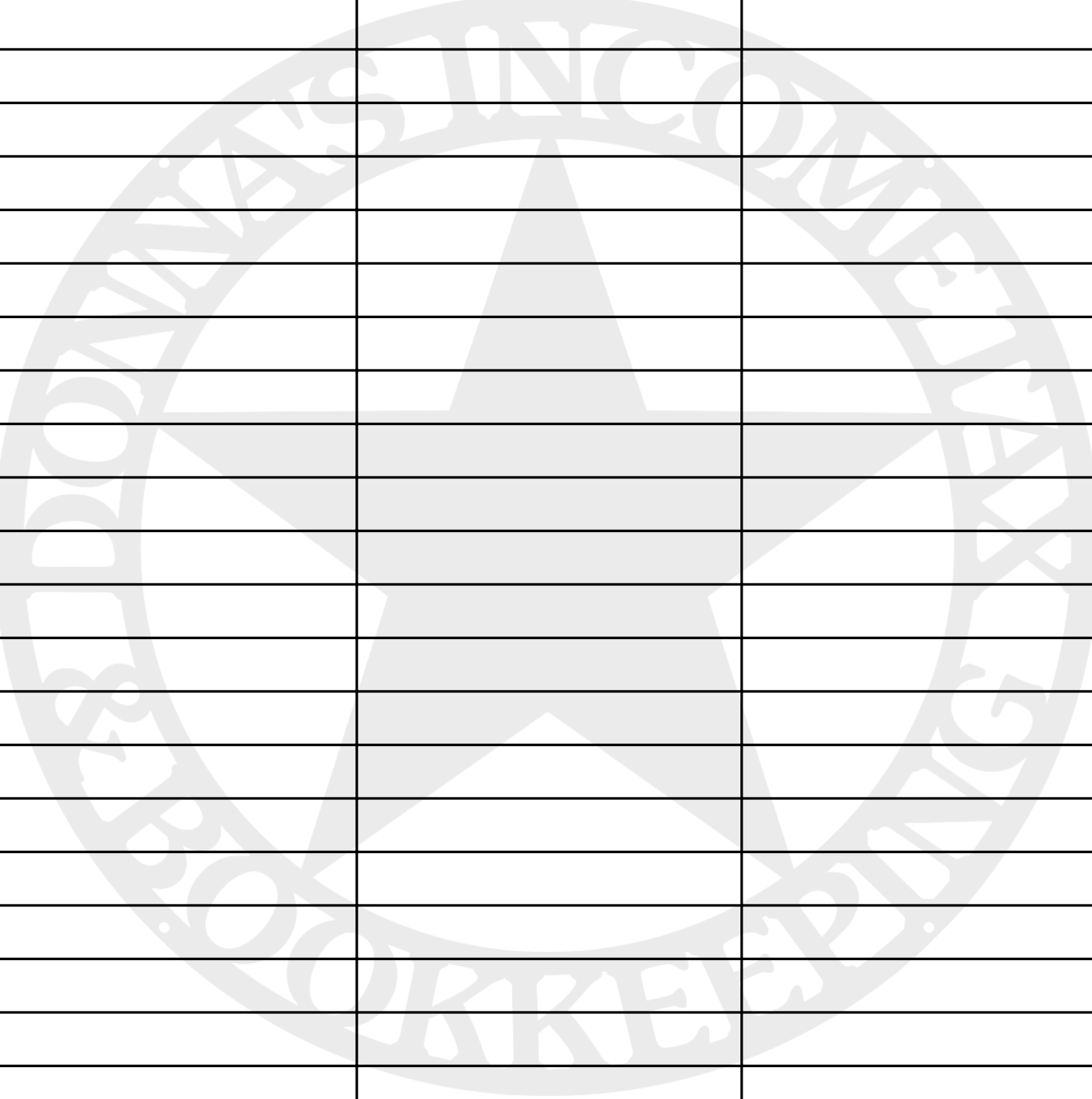


Patient's Name	Amount	Mileage

MEDICAL EXPENSES INCLUDING BUT NOT LIMITED TO CO-PAYS, OVERNIGHT HOTEL STAYS, MEDICAL MILEAGE, ETC.

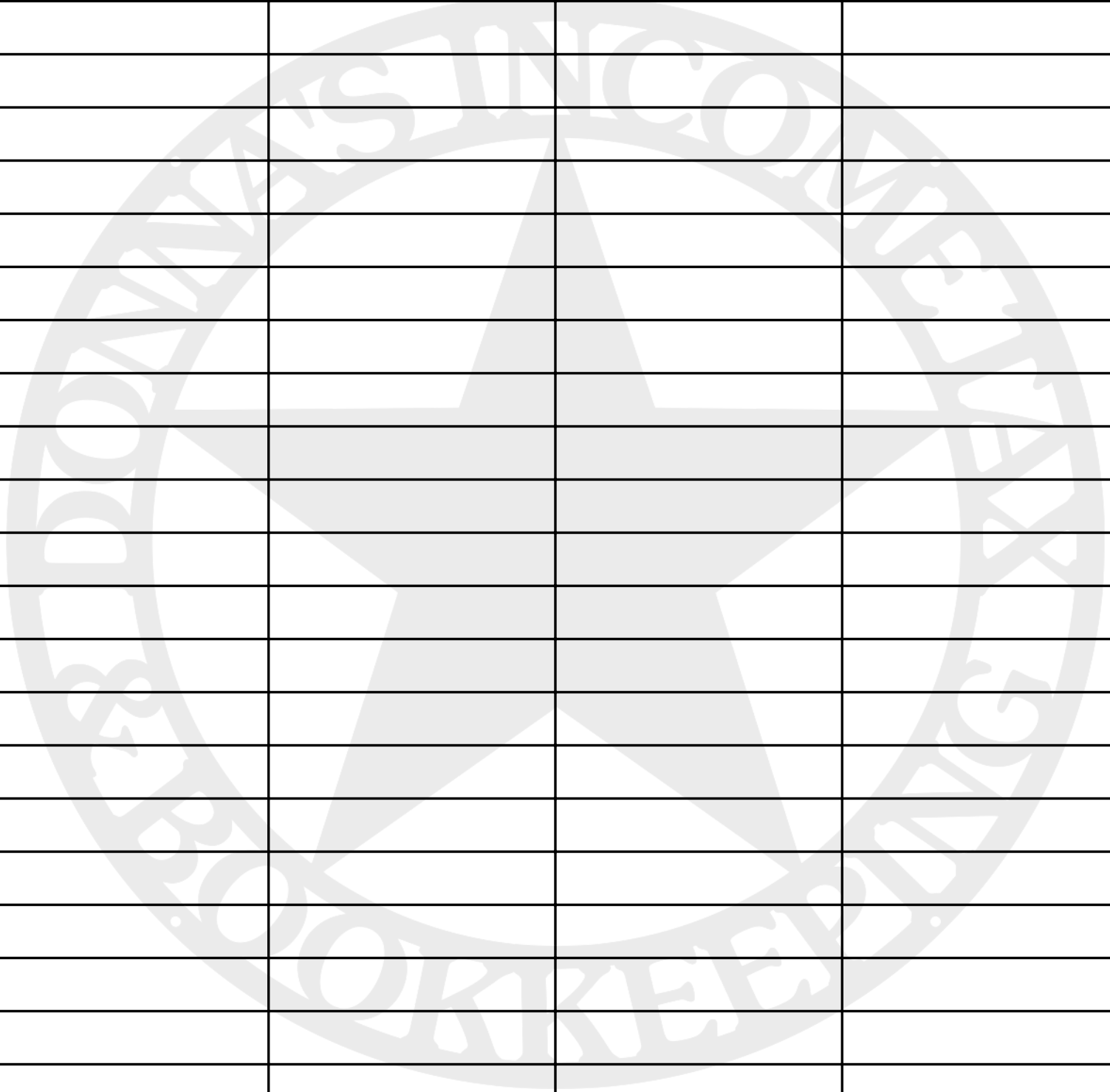
VEHICLE TRACKER

Vehicle ID	Mileage	Repairs



BUSINESS INCOME

Issued to	Business Name	EIN/Social Security #	Amount



BUSINESS EXPENSES

	Amount		Amount
Advertising		Showers	
Accounting/Office Fees		Supplies	
Clothing		Fuel	
Meals		Travel	
Cellphone/Accessories		Utilities	
Insurance		Cost of Goods	
Subscriptions		CDL/Medical Card	
Permits, Licenses/Registration & 2290		Drug Screenings	
Repairs		Parking Fees	
Tolls		Laundry	
Vehicle Wash		Oversize Escorts	
Days Worked			

ESTIMATED TAX

	Date of Payment	Amount
1st Quarter		
2nd Quarter		
3rd Quarter		
4th Quarter		

SALES TAX

	Amount		Amount
January		July	
February		August	
March		September	
April		October	
May		November	
June		December	

MAINTAINENCE LOG

Date	Truck #	Mileage

Repairs	Costs

LICENSE RENEWALS

Vehicle	License/Permit	Expiration Date

CAN INCLUDE OVERWEIGHT, BOND, LICENSE PLATE, OR DRIVERS LICENSE

Tax Prep Checklist

PERSONAL INFORMATION

- Your Social Security number or tax ID number
- Your spouse's full name and social security number or tax ID number

INFORMATION FOR OTHERS ON YOUR RETURN

- Date of Birth and social security numbers or tax ID numbers
- Childcare records (including provider's tax ID number) if applicable

INCOME

- W2 forms
- Rental Property Income
 - Records of income and expenses for rental(s)
 - Rental asset information including cost, date placed in service, etc. for depreciation
- Retirement Income
 - Pension (1099-R)
 - Social Security (1099-SSA)
- Unemployment
- Gambling Income (W2G)
- Health Savings Account and long term care reimbursements (1099-SA/1099LTC)
- Other 1099s
- Hobby income and expenses
- Prizes and awards

IRA CONTRIBUTIONS

- Form 5496 showing IRA contributions

SAVINGS & INVESTMENTS

- Interest dividend income (1099-INT/1099-DIV)
- Stock or other property sales (1099-B/1099-S)

EDUCATION

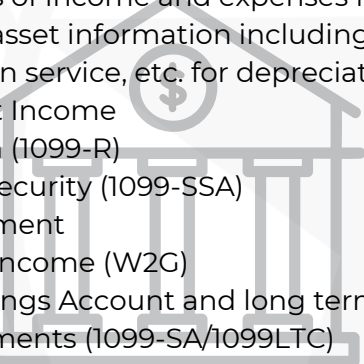
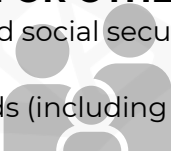
- Form 1098-T from educational institutions
- Form 1098-E if paid student loan interest
- Receipt of educational expenses (ex. clickers, scantrons, testing fees, etc.)

HEALTH CARE

- Medical Expenses including but not limited to co-pays, overnight hotel stays, medical mileage, etc.

SELF EMPLOYMENT INFORMATION

- Forms 1099-MISC, Schedule K-1 & income records to verify amounts not reported on 1099s
- Business use of a vehicle
 - business miles for the year
- Other business expenses
 - Advertising
 - Accounting/Office Fees
 - Clothing
 - Meals
 - Cellphone/Accessories
 - Donations
 - Insurance
 - Equipment Purchases
 - Subscriptions
 - Permits, Licenses/Registration
 - Repairs
 - Tolls
 - Vehicle Wash
 - Showers
 - Supplies
 - Fuel
 - Travel
 - Utilities
 - Cost of Goods
 - CDL/Medical Card
 - Drug Screenings
 - Days Worked
 - OTR Necessities
 - Parking Fees
 - Laundry
 - Oversize Escorts
- Taxes
 - Estimated
 - Sales Tax
 - Property Tax
 - 2290
- Interest
 - Loan
 - Mortgage
- Other
 - Energy-saving home improvements



Donna's Income Tax & Bookkeeping



830.374-9855



830.374.3975



822B E Crockett St.

Crystal City TX 78839

Thank you!