

Appleby & Associates

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ENTERTAINMENT DEDUCTIONS

Union/Dues

Professional Associations ___
 License Fees ___
 Professional Insurance ___
 Union Dues (POA/DSA) ___
 Other _____

Books & Subscriptions

Dictionary/Spellchecker ___
 English/Spanish Books ___
 Professional Journals ___
 Professional Textbooks ___
 Professional Software ___
 Thomas Guide/Map Book ___
 Thesaurus ___
 Other Books ___
 Other _____

Education Expenses

Auto Miles Driven ___
 Books/Paper/Pens ___
 Hotel/Motel ___
 Parking Fees/Valet ___
 Student Loan Interest ___
 Tuition/Lab Fees ___
 # of overnight stays ___
 Other _____

Professional Conferences

Air Fare ___
 Conference Fees ___
 Ground Transport ___
 Hotel/Motel ___
 Other _____

Job Seeking Expenses

Auto Miles Driven ___
 Air Fare ___
 Hotel/Motel ___
 Postage ___
 Resumes/Transcripts ___
 # of Overnight Stays ___
 Other _____

Costumes/Uniforms Clothing

Boots/Shoes ___
 Dry Cleaning ___
 (only non-street wear – lab/clinical)
 Gloves/Leather/Latex ___
 Jacket/Parka ___
 Jump Suit ___
 Logo T-Shirts/Caps ___
 Patches ___
 Rain Gear ___
 Tailoring/Alterations ___
 Other _____

Tools & Supplies

Batteries/Bulbs ___
 Binoculars ___
 Brasso/WD-40 ___

Briefcase/Satchel ___
 Camera/Film ___
 Cleaning Supplies ___
 Day-Timer/Planner ___
 Flashlight & Charger ___
 Gloves/Protection ___
 Locks/Locker Supplies ___
 Notebook/Pens/Paper ___
 Printing/Copies ___
 Software ___
 Safety Glasses ___
 Tape Recorder/Tapes ___
 Other _____

Miscellaneous

Cellular Phone/Fees ___
 Business Use of Cell ___%
 Desktop Computer ___
 Business Use of Comp. ___%
 Laptop Computer ___
 Movies & primers ___
 Printer ___
 Safe Deposit Box ___
 Other _____

Business Mileage

1st Location (miles per wk) ___
 2nd Location (miles per wk) ___
 Local Conference ___
 Local Workshop ___
 Job to Job ___
 Temporary Work ___
 Other _____

Contributions

Cash to Charity ___
 House of Worship ___
 Non-Cash Donations ___
 Payroll Deductions ___
 Station/Unit Funds ___
 Traditional IRA (not ROTH) ___
 Other _____

Volunteer (Out-of-pocket + miles)

Church/PTA ___
 Community Athletic Groups ___
 (Baseball, Football, Soccer, etc.)
 Government Organizations ___
 Qualified Charities ___
 Other _____

Property/ Vehicles

Boat/Trailer/Motorcycle ___
 DMV Auto License Fees ___
 Equity Line ___
 Home Mortgage Refi Points ___
 Mortgage Interest ___
 Motor Home ___
 2nd Home Interest ___
 Property Taxes ___
 State Taxes Owed and Paid from

prior years tax liabilities ___
 Prior Refi Points ___
 (deductible when loan paid off)
 Other _____

FOR NEW CLIENTS ONLY

Last Year's State Tax Refund ___
 Last Year's Tax Prep Fee _____

TIPS FOR TAX SEASON

1. Please, review "Other Possible Deductions/ Income" list. (This document is designed to help remember all necessary documents.)

2. If you sold stocks, bring the following for each transaction:

- Buy date & sale date
- Buy price & sale price

3. If you refinanced, bring all mortgage statements (1098's) from the old and new mortgage companies.