

ROBERT WOOD TAX SERVICE, INC.
 A PROUD AFFILIATE OF KEMPNER WEALTH MANAGEMENT
 661.253.1484
www.coptaxguy.com
www.kempnerwealthmanagement.com

EXECUTIVES AND BUSINESS PROFESSIONALS

<i>Professional Fees & Dues</i>		<i>Supplies & Expenses</i>	
Association Dues		Briefcase	
Credentials		Business Meals (enter 100% of expenses)	
License		Business Cards	
Professional Associations		Clerical Service	
Union Dues		Computer Software	
Other: _____		Computer Supplies	
<i>Continuing Education</i>		Customer Lists	
Correspondence Course Fees		Entertainment (enter 100% of expense)	
Course Registration		Equipment Repair	
Lab Fees		FAX Supplies	
Materials & Supplies		Gifts & Greeting Cards	
Photocopy Expense		On-Line Charges	
Reference Material		Legal & Professional Services	
Research Expenses		Office Expenses	
Seminar Fees		Photocopy Expenses	
Textbooks		Postage	
Other: _____		Shipping	
<i>Telephone Expenses</i>		Stationery	
FAX Transmissions		Technical Publications	
Paging Service		Other: _____	
Toll, Cellular, and Pay Calls		<i>Equipment Purchases</i>	
Other: _____		Cellular Phone	
<i>Auto Travel (In miles)</i>		FAX Machine, Calculator, and Copier	
Between Jobs or Locations		Pager, Recorder, and Phone	
Client Meetings		Computers and Printers (Special IRS Rules)	
Continuing Education		Modems and computer peripherals	
Job Seeking		Other: _____	

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Out of Town Business Trips		<i>Travel - Out of Town</i>	
Purchasing Job Supplies & Materials		Airfare	
Professional Society Meetings		Car Rental, Taxi, Bus, Train, and Subway	
Parking Fees and Tolls (\$)		Parking and Tolls	
Other: _____		Lodging (do not combine with meals)	
<i>Miscellaneous Expenses</i>		Meals (do not combine with lodging)	
Liability Insurance - Business		Porter, Bell Captain, and Laundry	
Subscriptions		Telephone Calls (including home)	
Resume`		Other: _____	

Don't Forget these other Personal Deductions:

PERSONAL DEDUCTIONS:

DMV Fees _____
 Boat/Trailer Fees _____
 Mortgage Interest _____
 2nd Home Interest _____
 Property Taxes _____

CASH PAID TO CHARITIES: (Please get receipts!!)

Sheriff/Police/Fire Relief _____
 House of Worship _____
 City of Hope _____
 United Way _____
 Girl Scout Cookies _____
 Other _____

FAIR MARKET VALUE OF NON-CASH ITEMS GIVEN TO CHARITIES: (Receipts!!)

Clothing _____ Electronics _____
 Furniture _____ Kitchen/Housewares _____
 **Vehicles/Boats – Special IRS Rules- _____

DON'T FORGET TO GET AND RETAIN YOUR RECEIPTS!