

WORK RELATED WORKSHEET

Tax Year \_\_\_\_\_ NAME \_\_\_\_\_

Business name or description: \_\_\_\_\_

(fill out new forms for each separate business):

**INCOME**

- \_\_\_\_\_ Self-employment Income (1099s) - not wages, not W2 income
- \_\_\_\_\_ Other (describe): \_\_\_\_\_
- \_\_\_\_\_ Other (describe): \_\_\_\_\_

**SELF-EMPLOYED HEALTH INSURANCE**

\_\_\_\_\_ Amount paid for premiums for you & your family - not employer plan

**BUSINESS /WORK EXPENSES**

- \_\_\_\_\_ Accounting & bookkeeping
- \_\_\_\_\_ Advertising
- \_\_\_\_\_ Agent
- \_\_\_\_\_ Bank fees (for dedicated business account)
- \_\_\_\_\_ Books & references
- \_\_\_\_\_ Business gifts
- \_\_\_\_\_ Cable
- \_\_\_\_\_ Car rental out of town for business
- \_\_\_\_\_ Certifications
- \_\_\_\_\_ Computer supplies & parts - Do not include major purchases listed on Page 3
- \_\_\_\_\_ Contest entrance fees
- \_\_\_\_\_ Directory listing/Player's directory
- \_\_\_\_\_ Domain/web server fees
- \_\_\_\_\_ Dues & subscriptions (magazines/newspapers/websites)
- \_\_\_\_\_ Education/acting classes/computer classes etc NOT college tuition
- \_\_\_\_\_ Equipment rental
- \_\_\_\_\_ Entertainment (deductible for CA only) - Live theatre, sporting events etc with Client
- \_\_\_\_\_ Film & Developing
- \_\_\_\_\_ Film festival fees
- \_\_\_\_\_ Headshots
- \_\_\_\_\_ Insurance for equipment
- \_\_\_\_\_ Insurance-business liability
- \_\_\_\_\_ Internet
- \_\_\_\_\_ Legal
- \_\_\_\_\_ Licenses and permits
- \_\_\_\_\_ Manager
- \_\_\_\_\_ Meals - Business and Travel
- \_\_\_\_\_ Meetings & Seminars
- \_\_\_\_\_ Memberships
- \_\_\_\_\_ Merchant card fees
- \_\_\_\_\_ Messenger/delivery
- \_\_\_\_\_ Streaming Services - NFLX, Hulu, IMDB, Prime etc
- \_\_\_\_\_ Office supplies - Do not include major purchases listed on Page 3
- \_\_\_\_\_ Outside service

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- \_\_\_\_\_ Parking
- \_\_\_\_\_ P O Box rental
- \_\_\_\_\_ Portfolio/resume
- \_\_\_\_\_ Postage
- \_\_\_\_\_ Printing
- \_\_\_\_\_ Promotion
- \_\_\_\_\_ Publicity
- \_\_\_\_\_ Rehearsal space
- \_\_\_\_\_ Rent - office rent (not your home)
- \_\_\_\_\_ Repairs-Equipment
- \_\_\_\_\_ Purchase of stock photos or documents
- \_\_\_\_\_ Script or copyright registration
- \_\_\_\_\_ Small equipment/tools/kit supplies - Do not include major purchases listed on P. 3
- \_\_\_\_\_ Special wear/gear - rented clothes, extreme weather
- \_\_\_\_\_ Software
- \_\_\_\_\_ Storage-work related
- \_\_\_\_\_ Supplies-Artist or crew kit
- \_\_\_\_\_ Telephone-fax, cell, home, phone cards
- \_\_\_\_\_ Trade Shows - booths, entrance fees ...
- \_\_\_\_\_ Transportation-local - See below
- \_\_\_\_\_ **Travel – total here, and please show details in Travel Log below**
- \_\_\_\_\_ Travel, dry cleaning after
- \_\_\_\_\_ Wardrobe & make-up (performers)
- \_\_\_\_\_ Work boots
- \_\_\_\_\_ Uniforms - company logo on it
- \_\_\_\_\_ Union dues
- \_\_\_\_\_ Voice mail or answering service
- \_\_\_\_\_ Website & hosting
- \_\_\_\_\_ Other \_\_\_\_\_
- \_\_\_\_\_ Other \_\_\_\_\_
- \_\_\_\_\_ Other \_\_\_\_\_
- \_\_\_\_\_ Other \_\_\_\_\_

Notes: \_\_\_\_\_

**For Business travel, make a simple travel log.**

*Example:*

<u>Dates</u>	<u>Where</u>	<u>Purpose</u>	<u># days</u>	<u>Air, train</u>	<u>Lodging</u>	<u>Parking</u>	<u>Taxi</u>
Jan	Sundance	Film Fest.	3	850	250	60	85

**Your Travels: \*Please include in total Travel above**

<u>Dates</u>	<u>Where</u>	<u>Purpose</u>	<u># days</u>	<u>Air, train</u>	<u>Lodging</u>	<u>Parking</u>	<u>Taxi</u>
_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____

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**EQUIPMENT PURCHASED: (\$2,500 or more - long term usage)**

<u>Date Purch</u>	<u>Description</u>	<u>Cost</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

**OFFICE FURNITURE PURCHASED: (\$2,500 or more - long term usage)**

<u>Date</u>	<u>Description</u>	<u>Cost</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

**HOME OFFICE - IF YOU WORK OUT OF YOUR HOME**

_____ Mortgage	Office Sq. Feet: _____
_____ Property tax	
_____ Home or renter's insurance	Total Sq. feet: _____
_____ Rent	
_____ Utilities (gas, water, electric)	
_____ Security	
_____ HOA payments	
_____ Repairs - not major improvements	
_____ Other _____	
_____ Other _____	
_____ Other _____	
_____ Other _____	

WORK RELATED WORKSHEET

Tax Year \_\_\_\_\_ NAME \_\_\_\_\_

**AUTOMOBILE - need information on each vehicle used for this business**

Make of car: \_\_\_\_\_  
Date Bought or Leased: \_\_\_\_\_  
Total miles driven in year: \_\_\_\_\_  
Business miles in year: \_\_\_\_\_  
Commute miles in year: \_\_\_\_\_  
Personal Miles in year: \_\_\_\_\_

Repair date 1 \_\_\_\_\_ Mileage reading on the bill: \_\_\_\_\_  
Repair date 2 \_\_\_\_\_ Mileage reading on the bill: \_\_\_\_\_  
Today's date \_\_\_\_\_ Today's Mileage reading: \_\_\_\_\_

Look for bills at least 8 months apart, start of year end of tax year

\_\_\_\_\_ Gasoline  
\_\_\_\_\_ Repairs & towing  
\_\_\_\_\_ Tires  
\_\_\_\_\_ Insurance  
\_\_\_\_\_ DMV  
\_\_\_\_\_ Miscellaneous: Car Washes and AAA  
\_\_\_\_\_ Car rental while car being fixed  
\_\_\_\_\_ Auto Lease payments  
\_\_\_\_\_ Auto Loan interest

Another car available when not working? \_\_\_\_\_  
If new lease, FMV of car: \_\_\_\_\_

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Make of car: \_\_\_\_\_  
Date Bought or Leased: \_\_\_\_\_  
Total miles driven in year: \_\_\_\_\_  
Business miles in year: \_\_\_\_\_  
Commute miles in year: \_\_\_\_\_  
Personal Miles in year: \_\_\_\_\_

Repair date 1 \_\_\_\_\_ Mileage reading on the bill: \_\_\_\_\_  
Repair date 2 \_\_\_\_\_ Mileage reading on the bill: \_\_\_\_\_  
Today's date \_\_\_\_\_ Today's Mileage reading: \_\_\_\_\_

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Use this space to communicate anything else you wish us to know: