

**Tax Deduction Check List: OUTSIDE SALESPEOPLE**

This sheet is to help you organize your employment-related deductible expenses. In order for an expense to be deductible, it must be considered an "ordinary and necessary" expense required by your employer and not reimbursed. If you are self-employed, then the standard is only "ordinary and necessary." Do not include expenses for which you've been reimbursed, expect to be reimbursed, or would be reimbursed if you asked your employer for it.

**Travel – Auto (In Miles)**

Between 1<sup>st</sup> and 2<sup>nd</sup> jobs (Miles): \_\_\_\_\_  
 Between company locations: \_\_\_\_\_  
 Client meetings, in town: \_\_\_\_\_  
 Out of town trips: \_\_\_\_\_  
 Purchasing supplies, materials: \_\_\_\_\_  
 Training events \_\_\_\_\_  
 Job search \_\_\_\_\_  
 Tolls and parking: \$ \_\_\_\_\_  
 (Please complete our auto usage organizer)

**Travel (Out of Town) and Meals**

Airfare \$ \_\_\_\_\_  
 Car rental \$ \_\_\_\_\_  
 Gas for car rentals \$ \_\_\_\_\_  
 Parking & tolls \$ \_\_\_\_\_  
 Bus, taxi, trains, shuttles \$ \_\_\_\_\_  
 Lodging (do not combine with meals) \$ \_\_\_\_\_  
 Porter, bellhop \$ \_\_\_\_\_  
 Telephone (hotel) \$ \_\_\_\_\_  
 Dry cleaning, laundry \$ \_\_\_\_\_  
 Meals, if kept receipts \$ \_\_\_\_\_  
 (Please attach a full list of dates & destinations of travel so we can compute per diem deductions)

**Professional**

Association dues \$ \_\_\_\_\_  
 Union dues \$ \_\_\_\_\_  
 License \$ \_\_\_\_\_  
 Legal/professional \$ \_\_\_\_\_  
 Liability insurance \$ \_\_\_\_\_  
 Other: \_\_\_\_\_

**Continuing Professional Education**

Class tuition & fees \$ \_\_\_\_\_  
 Materials & supplies \$ \_\_\_\_\_  
 Seminar/conference fees: \$ \_\_\_\_\_  
 Photocopy expenses \$ \_\_\_\_\_  
 DVDs/recordings \$ \_\_\_\_\_  
 Other: \_\_\_\_\_

**Communications**

Cell phone service \$ \_\_\_\_\_  
 Paging service \$ \_\_\_\_\_  
 Answering service \$ \_\_\_\_\_  
 Internet service \$ \_\_\_\_\_  
 FAX transmissions \$ \_\_\_\_\_  
 Pay phones, tolls \$ \_\_\_\_\_

**Equipment Purchases**

Answering machine \$ \_\_\_\_\_  
 Briefcase \$ \_\_\_\_\_  
 Computer & printer \$ \_\_\_\_\_  
 Cell phone \$ \_\_\_\_\_  
 Pager \$ \_\_\_\_\_  
 Copier/FAX \$ \_\_\_\_\_  
 Tape recorder/tapes \$ \_\_\_\_\_

**Supplies and Overhead Expenses**

Advertising \$ \_\_\_\_\_  
 Bank charges \$ \_\_\_\_\_  
 Bookkeeping \$ \_\_\_\_\_  
 Meals & entertainment (In full) \$ \_\_\_\_\_  
 Business cards/printing \$ \_\_\_\_\_  
 Clerical support \$ \_\_\_\_\_  
 Computer supplies \$ \_\_\_\_\_  
 Referral services \$ \_\_\_\_\_  
 Repairs, equipment \$ \_\_\_\_\_  
 Gifts (max. \$25/recipient) \$ \_\_\_\_\_  
 Online services \$ \_\_\_\_\_  
 Website \$ \_\_\_\_\_  
 Rent, office \$ \_\_\_\_\_  
 Office utilities \$ \_\_\_\_\_  
 Office supplies \$ \_\_\_\_\_  
 Postage \$ \_\_\_\_\_  
 Freight In \$ \_\_\_\_\_  
 Shipping \$ \_\_\_\_\_  
 Stationery \$ \_\_\_\_\_  
 Trade publications/books \$ \_\_\_\_\_

**Other:** \_\_\_\_\_