

	PERSONAL AND SMALL-BUSINESS RECORDS:
0	Personal Records Full legal names, SSNs, addresses, percent ownership, ownership acquisition date and distribution details for you, your spouse, any dependents and any other business owners.
0	Last Year's Federal and State Tax Returns Both personal and small-business returns.
0	Current Financial Statements and Bookkeeping Records Journal entries, profit and loss statements, balance sheets, etc.
0	Income Records All 1099 forms, plus W-2s from your spouse (if applicable).
0	Estimated Tax Payments All paperwork related to tax payments made during the year, including state, federal, property, etc.
0	General Ledger List of every expense category you plan to deduct from your small-business tax return.

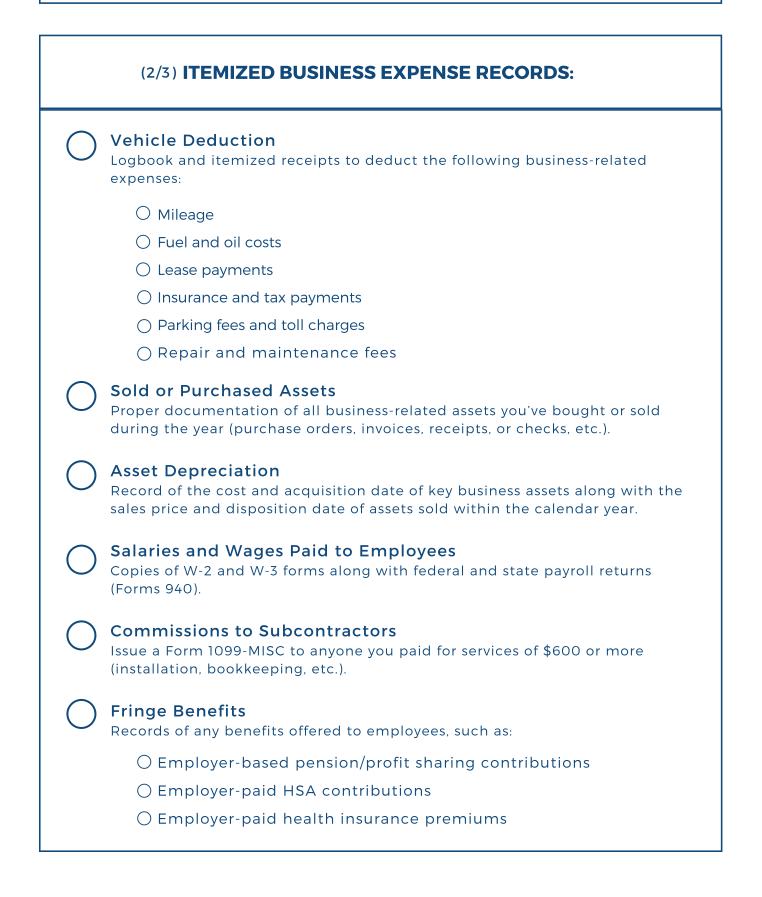
Taxes are a colossal expense for most businesses and individuals but they're also one of the best ways for you to save money and grow your wealth. And with the right experts, it's an effortless experience.





(1/3) ITEMIZED BUSINESS EXPENSE RECORDS:
O General Business Expenses Receipts for all business-related expenses you plan to deduct (itemize by category, vendor name, date, amount, etc.). Examples of common business- expense categories:
 Meals and entertainment
 Travel (hotel, airfare, transportation, etc.)
O Advertising (business cards, website, ads, etc.)
C Legal and accounting fees
○ Business insurance
○ Tax, business license, and permit fees
○ Office supplies
○ Internet and cell phone
○ Bank fees
○ Business loan interest
 Equipment, storage, and office rent
Home Office Deduction Examples of expenses you can report on Form 8829, which is attached to Schedule C of your 1040.
O Square footage of the home
O Square footage of the office space
O Utilities plus repairs
O Homeowner's/renter's insurance
O Form 1098s for mortgage interest
O Property taxes









(3/3) ITEMIZED BUSINESS EXPENSE RECORD	S:
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Self-Employment Expenses

Records of any additional self-employment-related expenses, including:

- Pension plan contributions
- IRA contributions (Form 5498)
- O Health insurance payments
- O Health Savings Account contributions (Form 5498-SA)
- Job-hunting and job-related educational expenses

OTHER EXPENSE RECORDS:

Charitable Contributions
 Detailed list of donations, receipts for contributions over \$250 and a Form 1023 for vehicle contributions.

 Health Care Expenses
 Records of medical and dental costs.

Alimony Expenses Ex-spouse's full name and SSN.

Education Expenses

Forms 1098-T (tuition statement and itemized receipts of educational expenses) and 1098-E (student loan interest statement).

Child and Dependent Care Expenses Name, address and tax ID or SSN of provider.