



**Taxpayer:** \_\_\_\_\_

**Tax year:** \_\_\_\_\_

-----  
Postage & Delivery  
-----

Repairs & Maintenance  
-----

Salaries/Independent Contractors  
-----

Software expense  
-----

Supplies  
-----

Taxes  
-----

Telephone  
-----

Travel  
-----

Utilities  
-----

**Additional Expenses (not noted above, use an attached schedule if necessary):**

-----  
-----  
-----  
-----  
-----

**Automobile Business Use Information**

**Automobile Mileage Information:**

Vehicle 1

Vehicle 2

Vehicle 3

Business Miles

-----

-----

-----

Commuting Miles

-----

-----

-----

Personal/Other Miles

-----

-----

-----

Total Miles Driven For The Year

=====

=====

=====

Taxpayer: \_\_\_\_\_

Tax year: \_\_\_\_\_

Notes/Comments

-----  
-----  
-----  
-----  
-----

**Please read and sign below as well as include this page with your information in order for us to complete your tax return.**

**I have submitted this information for the sole purpose of preparing my tax return. By signing below I am attesting that each item can be substantiated by receipts, canceled checks or other documentation and accordingly such records shall be maintained for a period of no less than 5 years from the date I file such returns. Furthermore the information presented above is true, correct and complete to the best of my knowledge.**

**If you are e-mailing please indicate the words "E-mailed" on the signature line below as well as the date. All such e-mails should be sent to: [taxinfo@kaplantaxservices.com](mailto:taxinfo@kaplantaxservices.com).**

Taxpayer: \_\_\_\_\_

Date: \_\_\_\_\_

**For Internal Use Only. Please do not write below this line...**

**Record of Telephone Conference: (for internal use only by David J. Kaplan & Associates, Ltd.)**

Client Name: \_\_\_\_\_

Client #: \_\_\_\_\_

Date of Call : \_\_\_\_\_

Time of call: \_\_\_\_\_

Interviewer: \_\_\_\_\_

Interviewee: \_\_\_\_\_

Notes/Comments:

-----  
-----  
-----