



H & R Pye's Tax Service

2011 LONG-HAUL TRUCKERS CHECKOFF LIST

Bath, Maine Telephone 207-443-6183 (outside local calling area 1-877-793-7829)

Please note if you are planning to mail in or drop off your tax information and papers - instead of having an appointment with us - **YOU MUST ANSWER ALL of the questions on this Checkoff list.** Simply checking off or Xing the questions does not tell us what we need to know. Please put down the answer, not applicable or none. If you need more room please attach a separate piece of paper and number your answers according to the question.

- A **TOTAL INCOME FOR BUSINESS** - whether paid by check or cash. Report only what you received in 2011. If the work was done in 2011 but you were not paid until 2012, then that is 2012 income. If you are reporting your income on the accrual basis we also need to know your accounts receivable at 12/31/10 and 12/31/11.
- B **EXPENSES**
- 1 **If you want us to do your W-2s and/or 1099s we need the information by January 21, 2011. These statements must be mailed to the recipients by January 31, 2012.**
 - 2 Advertising—business cards and stationary , uniforms—shirts - hats, team sponsors.
 - 3 Fuel and oil changes. Please keep separate.
 - 4 Donations - to non profit organizations made in your business name. The IRS says that individual business owners can not take a business deduction for donations they make - however if you get **recognition in writing** for your donation (such as a published list of thank yous to sponsors, a listing in a program etc) than that qualifies as advertising and you can get a tax deduction for that type of donation.
 - 5 Equipment Purchases - any major purchases you made (this would include any items you bought which will last for more than one year). Please list each item separately and provide date bought, cost, description and if you traded anything towards it we will also need to see the paperwork showing the trade in allowance. Examples - refrigerator, TV, microwave, CB radio.
 - 6 Equipment Sold - did you sell (or abandon) any business equipment in 2011 that you had bought in previous years? We will need to know what was sold, date sold, and how much you received.
 - 7 Showers, toiletries & laundry
 - 8 Insurance - this may include business liability, worker's compensation, truck/tractor, trailer. Please list separately.
 - 9 Interest Paid On Business Loans - such as start up loans, equipment loans, and credit cards used solely for your business.
 - 10 Rented or Leased Equipment - if you have leased or rented any equipment to be used in your business we will need to see the paper work on the lease. The equipment might be a tractor, trailer, forklift, office equipment.
 - 11 Legal & Professional fees - lawyers, permits, accountants, tax preparation.
 - 12 Cleaning supplies - examples: brooms, dust pans, disinfectant, paper towels, laundry detergent.

MORE QUESTIONS ON OTHER SIDE
Help us save a tree, please bring this Checkoff with you

- 13 Meals - you can take actual expenses, but you must save all restaurant slips or you can deduct \$59 per day if you are traveling thru multiple per diem locations times the number of days you were away overnight. How many nights were you away from home in 2011?

If you always travel to the same locations that we need to use the per diem for that location, so we will need the number of nights per location (i.e. if you always go from Portland, Maine to Atlantic City, New Jersey).
- 14 Office Expenses - envelopes, paper, pens, office supplies, postage, business bank fees, comcheck fees, money order fees, publications, etc.
- 15 Outside Labor or lumpers - the amount you paid people who were not on your payroll to help you in your business. If you have paid anyone \$600 or more for services than you must give them a 1099 misc. statement. You should have the person make out a W-9 statement. If you need some we can give them to you.
- 16 Truck/tractor washes
- 17 Uniforms - cost of buying or renting. Also maintenance and cleaning
- 18 Repairs - to all of your business equipment whether it's office equipment, tractor, trailer forklift, TV, CB radio, refrigerator, microwave, etc
- 19 Trade dues and union dues
- 20 Supplies - miscellaneous tools or materials -circuit tester, power booster, tie down hangers, hard hat, flashlights, batteries, fire extinguisher, first aid kits, gloves, maps etc
- 21 Taxes & licenses- such as excise taxes, plates, sales tax (if not already included in one of the other areas), registration fees, permits etc. Please list separately.
- 22 Telephone, cellular phones, calling cards and faxes - if you run your business out of your home and you have only one phone line, then we need the total of your long distance business calls. If you have 2 phone lines into your home, then you can pick one to be your business phone (for tax purposes) and the other will be personal (you will still be able to have a deduction for any long distance business calls made on either line but in addition you will get the basic phone service as a deduction on the 'business' line. If you have a cellular phone you may deduct 100% of the cost if it is used 100% for your business, otherwise you will only be able to deduct the business percentage.
- 23 Travel For Business Purposes - airfare, motel, meals (must be listed separately), tolls, parking, etc. Mileage for your business on your personal vehicle. Car rental and gas, taxi cabs, commuter buses, and shuttles.
- 24 Medical Insurance - if you are self-employed and pay for your own medical insurance we need to know how much you pay and who you pay.
- 25 Bedding cost for truck, seat cushion, weather receiver, safety boots/shoes, etc please list separately.
- 26 Truck/tractor, trailer or container storage
- 27 CDL driver license, physical (DOT), safety glasses, and job related testing. please list separately

Generally, any thing you have spent for your business is probably a tax deduction for your business. Since every business is unique you may have some items that we have not mentioned above. Please write them down and tell us about them.