Income Tax – Expense Recap

Name: _____

Self-Employment/Business Income Total:
(Do not include W2 wages)

$_____

Expenses for the Year 2023

Expenses	Annual Total
Medical	
Cost (not including health insurance)	
Health Insurance Premiums	
Cash Contributions	
(List separately amount donated and donated to)	
Non-cash Contributions (Over 500)	
Donee Name & Address	
Description of Property	
Date Acquired	
Date Donated	
Fair Market Value	
Home Office (Total Annual Amounts)	
Size of house sq feet	
Size of office sq feet	
Rent / Mortgage	
Mortgage Interest	
Utilities	
Homeowners Insurance	
Property Taxes	
Condo or Mgmt Fees (HOA)	
Repairs or Maintenance	
Security	
Business Vehicle Expenses & Mileage	
(calculate individually for each vehicle)	
Year / Make / Model	
Date vehicle was acquired	
Lease or Finance?	
Total Annual Miles: Personal & Business	
Annual Business Miles Driven	
Parking	
DMV Renewal	
Gas, Oil, Lube	
Insurance	
Interest	
Lease Payments	
Repairs or Maintenance	
Tires	
Wash & Wax	

Expenses	Annual Total
Self-Employed Business Expenses	
Accounting	
Advertising	
Bank Charges	
Commissions	
Dues & Subscriptions	
Equipment Rental	
Insurance (Business insurance)	
Interest: Finance Charges - Business Only	
Janitorial	
Laundry	
Legal and Professional	
Meals	
Office Supplies	
Outside Services	
Postage/Delivery	
Printing	
Rent - Office, Studio	
Repairs & Maintenance	
Security	
Storage	
Supplies - Equipment & Machinery (less than $500 per item)	
(List separately any items valued at more than $500 ea)	
Telephone (office & cellular)	
Uniforms	
Utilities (Office Only)	
Travel Expenses (away from home)	
Airfare	
Hotel	
Local Transportation (taxi & ride share)	
Other Expenses	
Books & Publications	
Business Gifts	
Continuing Education	
Internet	
Licenses & Permits	
Promotion	
Research (Streaming services, music, movies, etc.)	
Software	
Web Expenses	

Did you have any foreign bank accounts with an aggregate value of more than $10,000 at any time during 2023? Yes No

If yes, contact Down to Earth with all relevant information prior to March 22, 2024.

I understand and agree that these expenses are based on receipts and backup I have on file. It is my responsibility to keep all receipts and backup to be able to present to my accountant if requested, or in the event of an audit.

Name (Printed): _____

Signature:_____

Date:_____