

TAX PROFESSIONAL FORMS, SCHEDULES AND WORKSHEETS

Over the past 35+ years I have developed many specialized forms, schedules and worksheets for use in my 1040 practice. Some of my "homemade" forms are given to clients to help them provide me with the information I need to properly prepare their returns. Some are used as "memos" to the client's copy and my office file copy to back-up items reported on the returns. Others are used as attachments to the returns. They have proven helpful to me in my practice, and I believe you will find them helpful in your practice as well.

The package will be sent as a "word document" email attachment. You may edit and revise the forms, schedules and worksheets as you see fit to personalize them to your firm, to customize them be more relevant to your particular practice or clients or for specific professions, or to update information for annual COLAs or tax law changes.

Please be aware that this is copyrighted material and is for your internal use only.

A. SCHEDULE A -

1. Supplement to Schedule A
2. Medical Expense Worksheet
3. Medical Expenses - Out of Pocket Analysis
4. Charitable Contribution Listing - for non-cash contributions
5. Charitable Contribution Record - for cash contributions (2 pages)
6. Charitable Mileage Record
7. Contribution Worksheet
8. Employee Business Expenses - generic format, can be customized for different professions
9. Employee Business Expenses - Police Officer - example of customized
10. Conventions, Conference and Education

B. SCHEDULE C - (some of these forms can also be used for employee expenses)

1. Allocation of Expenses
2. Automobile Expense Worksheet
3. Auto Mileage Log
4. Business Expenses of a Freelance Writer
5. Business Travel Record
6. Computer Use Log
7. Election to Deduct Organization Expenses
8. Employee Expense Report
9. Employee Time Card
10. Home Office Deduction Worksheet
11. Cell Phone Log - In "landscape" format; will be sent separately.

C. SCHEDULE D -

1. Cost Basis Worksheet

C. SCHEDULE E -

1. Multi Family Building

D. GENERAL -

1. Alternative Minimum Tax Worksheet
2. Does Not Have To File

TOTAL COST SENT AS WORD EMAIL ATTACHMENT - ONLY \$5.00!