

2022 TAX DEDUCTION WORKSHEET

Trucker Driver

Please total all income and expenses you incurred for the year, in the following categories:

Total Income: \$ _____

Possible deductions from checks

Licenses & Permits: \$ _____

Physical Damage: \$ _____

Bobtail Fees: \$ _____

Health Ins: \$ _____

Reserve Withdrawals: \$ _____

Other: \$ _____

Administrative Fees <i>(ATM fees, check reorder, etc.)</i>	\$
Association Dues <i>(OOIDA, teamsters, etc.)</i>	\$
ComData/ComCheck Fees <i>(Computer software, CC fees, etc.)</i>	\$
Cleaning Supplies <i>(Window cleaner, RainX, etc.)</i>	\$
Interest Paid <i>(Business loan, CC, etc.)</i>	\$
Fuel & Oil	\$
Uniforms & Dry Cleaning <i>(Steel toe boots, etc. Everyday wear is NOT deductible)</i>	\$
Showers on the Road	\$
Repairs & Maintenance	\$
Truck Insurance <i>(Bobtail insurance, worker's comp, truck, trailer, PI & PD, etc.)</i>	\$
Truck Property Tax	\$
Truck Washes	\$
Truck Supplies <i>(see attached)</i>	\$
Small Tools <i>(Tire iron, flashlight, wrenches, etc.)</i>	\$
Permits & Licenses	\$
Office Supplies <i>(Logbook, clipboards, maps, etc.)</i>	\$
Satellite <i>(Qualcomm, Sirius, etc.)</i>	\$

Medical Exams <i>(DOT Physical, Drug testing, etc.)</i>	\$
Lodging Expenses	\$
Subscriptions <i>(Load board subscriber fees, trucking magazines, etc.)</i>	\$
FHUT <i>(Heavy Use Tax)</i>	\$
State Fuel Tax	\$
IFTA Tax	\$
Legal, Accounting & Professional Fees	\$
Leasing Costs <i>(Trailer rental fees, etc.)</i>	\$
Fees Paid to Dispatch Services	\$
Parking	\$
Loading/Unloading Fees	\$
Tolls & Scales	\$
Working Meals	\$
Telephone	\$
Internet	\$
Electronics <i>(GPS, CB Radio/repair, etc.)</i>	\$
Other <i>(Please list)</i>	\$

Personal Vehicle

Total business miles on personal vehicle: _____
(Banking, picking up supplies, etc.)

Days on Road (24hr): _____

If You Own or Are Purchasing Your Truck, Trailer, or if You Lease

Truck: Make and Model _____
 Purchase Price _____
 Date Purchased _____

Trailer: Make and Model _____
 Purchase Price _____
 Date Purchased _____

Lease/Rent: Lease/Rental Payments \$ _____

Please see the following checklist for documents and information to bring with you to your tax appointment:

- | | |
|---|---|
| <input type="checkbox"/> Last year's tax return not prepared in our office (Federal, State & Local) | <input type="checkbox"/> Social security statement |
| <input type="checkbox"/> Social security cards for each person | <input type="checkbox"/> IRA, pension or retirement distribution information (may be on a 1099R) |
| <input type="checkbox"/> Current driver's license for each adult | <input type="checkbox"/> IRA rollover/conversion information |
| <input type="checkbox"/> W-2s | <input type="checkbox"/> Student loan interest information (this may be on a 1098) |
| <input type="checkbox"/> 1099s for Interest and Dividends | <input type="checkbox"/> Education credit information |
| <input type="checkbox"/> 1099Bs or year end investment statements | <input type="checkbox"/> Childcare information including name, address, phone, EIN and amounts paid |
| <input type="checkbox"/> Stock/bond transaction information if not included on year end 1099B | <input type="checkbox"/> Settlement papers from buying/selling home |
| <input type="checkbox"/> Information about any refunds from the State or Local government regarding overpayment of prior year taxes | <input type="checkbox"/> Notice from IRS re: Child Tax Credit Payments and Stimulus Payment |
| <input type="checkbox"/> Information regarding sale of any investment property or stock | |
| <input type="checkbox"/> K1s received from any corporations, partnerships, etc. | |
| <input type="checkbox"/> Unemployment statement 1099G | |

Examples of Trucking Supply Deductions

Adapters	Flags	Rain Gear
Air Fresheners	Flares	Refrigerator
Alarm Clock	Floor Mats	Rope/Tie Downs
Alarm System/Guard Dog	Fuses	Seat Covers
Antennas	Gloves (for driving)	Safety Devices
Awning	Grill	Safety Glasses
Batteries	Hand Cleaner/Sanitizer	Signs
Bedding/Blankets	Hard Hat	Steno Pads
Bun Heaters/Fans	Hub Caps	Storage Shed
Cab Curtains	Ice Scrapers	Suitcase/Luggage
Cabinets	Keys	Sunglasses
Calculator	Laundry Bag	Tarps
Calendars	Laundry Soap	Thermos
Camera (if needed for job)	Lawn Chairs	Tire Gauges
Camping Gear	Lights	Toaster
Chains	Load Locks	Toiletries
Clothing Hangers	Lock	Towels
Coffee Maker	Mailbox Rental	Trash Bags
Cookware	Map Lamp	Travel Bags
Cooler	Mattresses	Truck Cables
De-icer	Phone Cards	Tupperware
Duct Tape	Portable Vacuum	TV/DVD
Face Masks	Power Booster	Water Jug
First Aid Supplies	Power Cord	