

Mr. Money

BUSINESS EXPENSES OF INSURANCE SALES PEOPLE

PROF. DUES, FEES, & EXPENSES

_____ Association dues
 _____ Chamber of commerce/networking
 _____ License
 _____ Professional subscriptions
 _____ Technical books
 _____ Trade publications
 _____ Other: _____
 _____ Other: _____

MAINTENANCE & REPAIR

_____ Answer machine
 _____ Computer
 _____ Copy machine
 _____ FAX
 _____ Office equipment
 _____ Printer
 _____ Telephone equipment
 _____ Other: Cell phone/PDA
 _____ Other: Cameras

TELEPHONE

_____ Answering service
 _____ Monthly base rate (only if separate, business phone line)
 _____ Paging service
 _____ Pay phone
 _____ Toll calls (from personal phone bill)
 _____ Other: Fax charges
 _____ Other: Cell calls
 _____ Other: Internet fees
 _____ Other: Website fees

EQUIPMENT PURCHASES

DATE	AMOUNT	
_____	_____	Answer Machine
_____	_____	Cell phone: ____% of business use, if less than 100%
_____	_____	Computer ____% of business use, if less than 100%
_____	_____	Copy machine
_____	_____	FAX machine
_____	_____	Pager
_____	_____	Printer
_____	_____	CD/DVD player ____% of business use, if less than 100%
_____	_____	Telephone
_____	_____	Other: Business software, firewalls/security
_____	_____	Other: Camera ____% of business use, if less than 100%

SUPPLIES & EXPENSES

_____ Advertising
 _____ Bank charges
 _____ Books
 _____ Bookkeeping
 _____ Briefcase
 _____ Business (entertainment) meals
 _____ Business cards
 _____ Clerical service
 _____ Computer software & supplies
 _____ Customer lists
 _____ Entertainment
 _____ FAX charges (already under telephone)
 _____ Flowers
 _____ Gifts (\$25 limit)
 _____ Greeting cards
 _____ Insurance, liability
 _____ Legal and professional services
 _____ Map book/GPS fees
 _____ Office expenses
 _____ Photocopy expense
 _____ Postage/overnight delivery
 _____ Referral fees
 _____ Rent, cleaning & utilities
 _____ Samples
 _____ Shipping
 _____ Stationery
 _____ Other: Ink/toner cartridges
 _____ Other: CD/DVD media

CONTINUING PROF. EDUCATION

_____ Correspondence course fees
 _____ Photocopy expense
 _____ Registration
 _____ Seminar fees
 _____ Supplies
 _____ Textbooks, audio media
 _____ Tuition
 _____ Other: On-line course fees

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TAXPAYER: _____

ID# _____

AUTO TRAVEL

TOTAL MILES	PARKING/TOLLS	PURPOSE
_____	_____	Away from home business (overnight)
_____	_____	Between first and second job
_____	_____	Business entertainment and meals
_____	_____	Classes
_____	_____	Equipment maintenance
_____	_____	Equipment rental
_____	_____	Meetings
_____	_____	Prospecting
_____	_____	Purchasing supplies and materials
_____	_____	Repairs
_____	_____	Sales calls
_____	_____	Seminars
_____	_____	Training
_____	_____	Other: _____
_____	_____	Other: _____

Note: Trips between your home and primary work location and trips between your home and first business stop of the day are not deductible unless you have a qualified "home office."

TRAVEL AWAY FROM HOME OVERNIGHT

TRANSPORTATION	LIST OUT-OF-TOWN TRIPS	
	DATES	BUSINESS PURPOSE
_____ Airfare	_____	_____
_____ Car rental and gas	_____	_____
_____ Parking and tolls	_____	_____
_____ Taxi	_____	_____
_____ Train, bus, subway	_____	_____
_____ Other: _____	_____	_____

MISCELLANEOUS

_____ Laundry	_____	_____
_____ Lodging	_____	_____
_____ Meals	_____	_____
_____ Porter, bell captain, maid	_____	_____
_____ Fax, copying service	_____	_____
_____ ATM fees	_____	_____
_____ Newspapers, trade magazines	_____	_____
_____ Other: _____	_____	_____

SPECIAL QUESTIONS

Were you reimbursed for any of your business expenses? ___ yes ___ no
 If so, how much were you reimbursed? (List by individual expense category.)

List any equipment you sold that you previously claimed as a business expense:

DATE SOLD	AMOUNT	DESCRIPTION
_____	_____	_____
_____	_____	_____