

VEHICLE, TRAVEL, MEALS & ENTERTAINMENT EXPENSES



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Client Name: _____

Tax Year: _____

This worksheet is self-employed individuals with travel & entertainment expenses, as well as for employees with similar expenses that are not 100% reimbursed by the employer.

Check One: **SELF-EMPLOYED** **EMPLOYEE** (Does your employer have a reimbursement policy? Y N)

VEHICLE EXPENSES

ID	Year/Make/Model	New/ Used	Own/ Lease	Purchase Date	Cost	Date of First Use	Value on that Date	Replaced Another?
A					\$		\$	
B					\$		\$	

ID	Odo (Jan 1)	Odo (Dec 31)	Total Miles	Business Miles	Commute Miles	Personal Miles	Sold this Year?	Selling Price
A								\$
B								\$

Daily round-trip commute distance		Days commuted per week	
Weeks worked per year			

If you have an auto loan, interest paid for the year (Vehicle A)	
If you have an auto loan, interest paid for the year (Vehicle B)	
If you lease, monthly lease payment:	
Do you have another car/vehicle available for use?	

LOCAL EXPENSES (DO NOT INCLUDE COMMUTING)

Tolls		Public Transportation	
Parking			

ACTUAL EXPENSES (100% TOTAL FOR YEAR)

Gas		Registration/State Inspection	
Oil/Filters/Routine Maintenance		Auto Club Membership	
Tires		Towing/Repairs	
Insurance			

LOCAL MEAL/ENTERTAINMENT EXPENSES

Business Meals			
Business Entertainment			

To be deductible: There must be "more than a general expectation" that new or increased income will result. In addition, you must keep records of all attendees, the date, venue, and business purpose of the expense.

Your own meals when you are not away from the vicinity of your home or place of business are not deductible (even if you choose to eat while working, for example).

TRAVEL EXPENSES (AWAY OVERNIGHT)

• TRIP 1 •

Purpose of trip:

Total days out of town	
Number of personal days included	

Did anyone travel with you?	

TRANSPORTATION

Airfare/Train	
Rental Car	
Rental Car Fuel	
Tolls	

Parking	
Public Transport (taxi, subway, bus)	
Passport Photos	
Baggage Fees / In-flight Necessities	

LODGING

Hotel	
Tips	
Dry Cleaning	

Internet Access	
Telephone	

MEALS & ENTERTAINMENT (SEE NOTE ON PAGE 1)

Meals (your own)	
Business Meals (for others)	

Business Entertainment (for others)	

• TRIP 2 •

Purpose of trip:

Total days out of town	
Number of personal days included	

Did anyone travel with you?	

TRANSPORTATION

Airfare/Train	
Rental Car	
Rental Car Fuel	
Tolls	

Parking	
Public Transport (taxi, subway, bus)	
Passport Photos	
Baggage Fees / In-flight Necessities	

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MEALS & ENTERTAINMENT (SEE NOTE ON PAGE 1)

Meals (your own)	
Business Meals (for others)	

Business Entertainment (for others)	