

“ENTERTAINING TAXES”

TAX ORGANIZER

We must input info from your **Driver's License** or State ID into the tax return. [ID number, State Name, Date Issued, Date Expired.] See last page to list.

TAX YEAR: \_\_\_\_\_

Taxpayer

Spouse

SSN Name:

\_\_\_\_\_  
First M. I. Last First M. I. Last

Professional Name:

\_\_\_\_\_

Date of Birth:

\_\_\_\_\_

Social Security Number:

\_\_\_\_\_

Work/Occupation:

\_\_\_\_\_

E-Mail Address:

\_\_\_\_\_

Phone Numbers: Cell

\_\_\_\_\_

Home/Other

\_\_\_\_\_

Mailing Address:

\_\_\_\_\_ → Street or PO Box Number City, State Zip

Do you Rent or Own?

Rent  Own  N/A

Did you have Health Insurance?

Yes  No If so, how many months? \_\_\_\_

*[It must be acceptable under ACA (Affordable Healthcare Act) for you and your dependents.]*

Do you have a foreign bank account or trust?

Yes  No



Dependents:

\_\_\_\_\_  
First M. I. Last First M. I. Last

Date of Birth:

\_\_\_\_\_

Social Security Number:

\_\_\_\_\_  
*(use another page if needed for more dependents)*

Direct Deposit Info:

\_\_\_\_\_  
Routing Number Account Number

Bank Name:

\_\_\_\_\_ Checking or Savings?

You may need to do separate expense list for each business or a separate sheet for non acting related business expenses.

**Deductible Expenses**

<b><u>Business Expenses</u></b>	<b><u>Total</u></b>	<b><u>Business Expenses (cont.)</u></b>	<b><u>Total</u></b>
Advertising: Business Cards, Postcards	_____	Research: Films Videos Theatre	_____
Advertising: Business Gifts (\$25 per person)	_____	Rent: Business PO Box	_____
Advertising: Casting Services & Websites	_____	Rent: Equipment	_____
Advertising: Demo Reel Cost & Fees	_____	Rent: Rehearsal Studio/Theatre	_____
Advertising: Headshot Photoshoot Resumes	_____	Rent: Storage For Business	_____
Advertising: Publicist	_____	Supplies: Books Scripts Music	_____
Advertising: Website Hosting Domain	_____	Supplies: Props Set Pieces	_____
Bank Fees: For Business Only	_____	Supplies: Software	_____
Bookkeeper Fees	_____	Trade Publications	_____
Business Meals & Meetings (in-town)	_____	Travel: Airfare	_____
Business Meals (out-of-town/travel)	_____	Travel: Lodging	_____
Business Transport: (Taxi,Subway,Bus,etc)	_____	Travel: Car Rental Taxi Subway Bus	_____
Cable TV: ____% Used for Research	_____	Travel: (Per Diem) City: _____ State: __ Nights: __	_____
Cable Internet: ____% For Business	_____	Travel: (Per Diem) City: _____ State: __ Nights: __	_____
Commissions: Agent Fees	_____	Travel: (Per Diem) City: _____ State: __ Nights: __	_____
Commissions: Manager Fees	_____	<i>(Use another page if necessary)</i>	_____
Contract Labor: Personal Assistant	_____	Union Dues: SAG-AFTRA AEA DGA IATSE	_____
Contract Labor: Stage Manager Tips	_____	Union Dues: Professional Organizations	_____
Contract Labor: Wardrobe/Dresser Tips	_____	Other Expenses (List item & amount below)	_____
Equipment: Update Repair Accessories	_____	_____	_____
Equipment: Type _____ Date _____	_____	_____	_____
Equipment: Type _____ Date _____	_____	_____	_____
<i>(Use another page if necessary for Equipment Purchases)</i>	_____	_____	_____
Film Festival Fees	_____	<b><u>Other Deductible Expenses</u></b>	<b><u>Total</u></b>
Film Production Costs <i>(Use another page w/ list)</i>	_____	Charitable Donations (Cash or Check)	_____
Insurance For Business	_____	Charitable Donations (Clothing or Goods)	_____
Legal Fees (business related only)	_____	<i>(Please provide receipt of donations)</i>	_____
License: Business or Professional	_____	Childcare Expenses	_____
License: City of LA	_____	<i>(Need Provider Name, Tax Id, Address, Phone)</i>	_____
Make-up & Hair For Business Use Only	_____	_____	_____
Office Expense: Batteries Copies Fax	_____	College Tuition & Fees (Form 1098-T)	_____
Office Expense: Postage Freight Courier	_____	College Books & Supplies	_____
Office Expense: Printer Toner Ink	_____	DMV Registration Fee (VLF Amount)	_____
Office Expense: Supplies	_____	Energy Efficient Items Purchased For Home	_____
Parking & Tolls	_____	<i>Energy Star Products: Windows, Heating, Cooling, etc. Bring Receipt</i>	_____
Performance Costumes or Uniforms	_____	Health Insurance (Form 1095 - A,B,C)	_____
<i>(Not Clothes that can be worn on the street)</i>	_____	Medical: Co-Pays,Dental,Vision,Prescriptions	_____
Passport Fees	_____	Investment Fees (Retirement Acct Fee)	_____
Phone: Cell ____% For Business	_____	Mortgage Interest (Form 1098)	_____
Phone: Cost & Accessories / Fax Line	_____	Real Estate Taxes	_____
Publicity Appearance: Fees & Services	_____	Student Loan Interest (Form 1098-E)	_____
Professional Development	_____	Sales Tax On A Vehicle Purchase	_____
<i>(Classes Workshops Seminars)</i>	_____	<i>(Please supply copy of Sale Contract)</i>	_____

# "ENTERTAINING TAXES"

# TAX ORGANIZER

<u>Other Deductible Expenses (cont.)</u>	<u>Total</u>	<u>Special Information</u>	<u>Total</u>
State Taxes Paid <i>(Did you owe money to the state last year?)</i>	_____	Adoption Expenses	_____
Tax Preparation Fees	_____	Alimony Paid	_____
		Alimony Received	_____
<b><u>Auto Expenses</u></b>	<b><u>Total</u></b>	Other Schedule C Income: Taxpayer	_____
<b><i>(First Vehicle)</i></b>		Other Schedule C Income: Spouse <i>(Not listed on 1099-Misc for Schedule C Income)</i>	_____
Year of the Vehicle	_____	Retirement Plan Contributions: Taxpayer	_____
Make & Model	_____	Retirement Plan Contributions: Spouse	_____
Date of Purchase	_____	IRA or Roth?	_____
Odometer Reading First of Year	_____		
Odometer Reading End of Year	_____		
Total Miles Driven	_____	<b><u>Estimated Tax Payments</u></b>	
Business Miles Driven	_____	<u>Date Paid</u>	<u>Federal</u>
Charitable Miles Driven	_____	<u>State</u>	
Medical Miles Driven	_____	1st Quarter	_____
<i>Must have mileage log to claim expenses below.</i>		2nd Quarter	_____
Auto Club Membership Fee	_____	3rd Quarter	_____
Car Insurance	_____	4th Quarter	_____
Gas	_____		
Purchase Price	_____	<b><u>Home Office Expenses</u></b>	<b><u>Total</u></b>
Repairs & Oil Changes	_____	Total Square Feet of Business Office	_____
		Total Square Feet of Residence	_____
<b><i>(Second Vehicle)</i></b>		Renter's Insurance	_____
Year of the Vehicle	_____	Total Rent Paid for the Year	_____
Make & Model	_____	Repairs	_____
Date of Purchase	_____	Utilities (Gas and Electric Only)	_____
Odometer Reading First of Year	_____	Other:	_____
Odometer Reading End of Year	_____		
Total Miles Driven	_____	<b><u>Drivers License Info</u></b>	
Business Miles Driven	_____	<u>Taxpayer</u>	<u>Info</u>
Charitable Miles Driven	_____	State Name	_____
Medical Miles Driven	_____	ID Number	_____
<i>Must have mileage log to claim expenses below.</i>		Issued Date	_____
Auto Club Membership Fee	_____	Expiration Date	_____
Car Insurance	_____	<u>Spouse</u>	<u>Info</u>
Gas	_____	State Name	_____
Purchase Price	_____	ID Number	_____
Repairs & Oil Changes	_____	Issued Date	_____
		Expiration Date	_____

Any other questions or possible deductions:

THANK YOU for taking the time to complete the above information. Although only the totals are needed, you are responsible to keep documentary evidence, such as receipts, cancelled checks or bills to support your expenses. (It is suggested that records be kept for five years or more from the date your tax return was filed.)