

OVER THE ROAD TRUCKERS

2023

NAME _____

Federal ID number (if applicable) _____

Is this business registered as a Limited Liability Company? (LLC) YES NO

If "yes", are you aware of the **NEW BOI** reporting requirements for business owners? YES NO

Did you pay any individual/business over \$600 in interest, rents, or other compensation? YES NO

If "yes", did you or will you file the required Forms 1099? YES NO

Did you receive over \$10,000 in any single transaction in 2023? YES NO

Did you receive any income from virtual currency transactions in 2023? YES NO

If "yes", please provide full details

During 2023, did you sell or dispose of any business property or equipment that you are currently or have previously depreciated? If "yes", enclose details YES NO

Did you provide any services for a business located in another state? YES NO

If "yes" please provide the income received from the other state. _____

MAJOR PURCHASES -

DO NOT INCLUDE IN YOUR EXPENSES ON THE OTHER SIDE

ITEM PURCHASED	DATE PURCHASED	COST (SALES TAX INCLUDED)

I hereby certify that I have included all income received in conducting my business including both 1099 income and all cash received. I have adequate written receipts, records, cancelled checks, and books to substantiate all expenses claimed. Accurate Tax has explained all of the recordkeeping requirements for these expenses and also the consequences for failing to keep the records, including full or partial disallowance of the expenses which will result in additional taxes, interest and penalties.

Business Owner's Signature _____

Date _____

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MEAL ALLOWANCE:

1. You have the option of keeping **ALL** receipts and claim the actual amount you spent on meals.
2. You are allowed 80% of the full amount of the standard meal allowance. If you choose the standard meal allowance, you can claim **\$69.00 a day** on all travel. You must keep records of when you leave and when you return. The standard meal allowance requires you to prorate if you are not traveling for the entire 24 hour period. For both the day you depart and the day you return you are allowed 75% of the full day amount (\$51.75). **Whichever option you choose, you must continue to use the same method for the entire year.**

We have tried to put this worksheet together to help you get organized for your appointment. Please bring the completed form with you at the time of your appointment. **Always keep in mind, these records will be required if ever audited.**

TOTAL INCOME _____

MEALS:
 # FULL DAYS ON THE ROAD _____
 # PARTIAL DAYS..... _____
 OR ACTUAL COST..... _____

EXPENSES

INSURANCE (Not health)..... _____
 Health..... _____
 INTEREST..... _____
 ACCTNG/LEGAL SERVICES..... _____
 OFFICE SUPPLIES/POSTAGE..... _____
 GARAGE RENT..... _____
 REPAIRS/MAINTENANCE..... _____
 SUPPLIES..... _____
 LICENSE/TAXES..... _____
 MOTELS..... _____
 PHONE..... _____
 LOADING/UNLOADING..... _____
 SCALES..... _____

TOLLS..... _____
 FUEL..... _____
 TRUCK WASHES..... _____
 CLAIMS..... _____
 SUBCONTRACTING..... _____
 SHOWERS..... _____
 OTHER - (LIST):

SEE SEPARATE MILEAGE WORKSHEET, IF NEEDED