SHELLARK LLC TAX SOLUTIONS

Tax Deduction Worksheet

Personal expenses and supporting records

Client name _____ **Tax year** _____

Enter actual amounts paid. Keep receipts and flag reimbursements or mixed use.
Shellark will review eligibility, limits and the tax treatment for your filing year.

Medical and dental	**Amount ($)**
Doctors, dental care, hospital and other medical services	
Prescriptions and eligible medical supplies	
Health, dental or long-term care premiums paid personally	
Medical reimbursements received	

Taxes and home mortgage	**Amount ($)**
State and local income taxes paid	
General sales tax paid (alternative for review)	
Personal real estate taxes paid	
Value-based personal property taxes paid	
Home mortgage interest and points (attach Form 1098)	

Charitable giving	**Amount ($)**
Cash gifts to charitable organizations	
Noncash gifts (estimated fair market value)	

Attach a list of organizations, dates, amounts and acknowledgments.
For donated property, include description, condition, original cost and valuation method.

Other items or questions for Shellark

Include applicable medical or charitable mileage logs and other tax documents.

_____

_____

_____

Business Expenses

Self-employment | Use one copy per business

Client name _____ **Tax year** _____

Business / activity _____

Enter the business share before tax limits. Transfer annual totals from the tracker if used.

Operating expenses	Amount ($)
Advertising / marketing	
Office expenses / software	
Business supplies	
Contract labor	
Legal / professional fees	
Business insurance	
Licenses / business taxes	
Rent / lease (nonvehicle)	
Utilities / phone / internet	
Repairs / maintenance	
Business travel (excluding meals)	
Business meals (full cost)	
Other operating expenses	

For other expenses, attach a list. Identify reimbursements separately.

Records to bring when applicable

- ☐ Vehicle log, including business and total miles, and vehicle expense records
- ☐ Equipment purchases, including cost, date first used and business-use percentage
- ☐ Home office details, including workspace and total home square footage
- ☐ Inventory and cost of goods sold records

Notes for Shellark

IRS references | irs.gov/ScheduleA | irs.gov/ScheduleC