

## Trucker's Income & Expense Worksheet

Name: \_\_\_\_\_ Federal ID # \_\_\_\_\_

Name of Business: \_\_\_\_\_

Address of Business: \_\_\_\_\_

How many months was this business in operation during the year? 12 Months \_\_\_\_\_ OR From \_\_\_\_\_ To \_\_\_\_\_

How many hours during the year did you and/or your spouse devote to the business? Full-time OR # of hours \_\_\_\_\_

Is any portion of your investment in this business NOT subject to payback by you? Yes No

### ▼ BUSINESS INCOME ▼

Linehaul Trucking		1099-MISC. Bring in ALL 1099s forms received.  Do your records agree with the amounts reported?      Yes <input type="checkbox"/> No <input type="checkbox"/>
Fuel Surcharge		
PickUp and Delivery		
Truck Rental Fees		
Other Income		

### ▼ SALES OF EQUIPMENT, MACHINERY, LAND, BUILDINGS HELD FOR BUSINESS USE ▼

Kind of Property	Date Acquired	Date Sold	Gross Sales Price	Expenses of Sale	Original Cost

### ▼ CAR and TRUCK EXPENSES (Personal Vehicle) ▼

	Vehicle 1	Vehicle 2
<b>Year and Make of Vehicle</b>		
<b>Date Purchase (Month, Day, Year)</b>		
<b>Ending Odometer (Reading Dec. 31)</b>		
<b>Beginning Odometer (Reading Jan. 1)</b>		
<b>Total Miles Driven (End Odo - Beg Odo)</b>		
<b>Total Business Miles (do you have another vehicle?)</b>		
<b>Total Commuting Miles</b>		
<b>Parking Fees and Tolls</b>		
<b>License Plates</b>		
<b>Interest</b>		
<i>Continue only if you take actual expense (must be actual expense if you lease)</i>		
<b>Gas, oil, lube, repairs, tires, batteries, insurance, supplies, etc.)</b>		
<b>Lease costs</b>		
<b>Other</b>		

<input checked="" type="checkbox"/>	<b>Business Miles (Examples)</b>
	Job seeking miles
	Out-of-town business
	Bank trips
	Business meetings
	Other temp. locations
	Other
<input checked="" type="checkbox"/>	<b>Commuting Miles</b>
	To truck or business location
<b>Mfg. gross vehicle weight (check one):</b>	
	6,000 lbs. or less
	Over 6,000 lbs.

### ▼ TRUCKER'S EXPENSES ▼

<b>ADVERTISING</b> ads, business cards	
<b>COMMISSIONS PAID</b> lumper/helper	
<b>EMPLOYEE BENEFITS</b> health insurance	
milage reimbursements, company party	
<b>TRACTOR FUEL</b>	
<b>FUEL</b> tractor fuel	
reefer fuel	
<b>INSURANCE</b> worker's comp, business liability	
truck insurance, etc.	
<b>MORTGAGE INTEREST</b> paid to institution	
paid to individual	
<b>OTHER INTEREST</b>	
truck Loans	
equipment Loans	
business Only credit card	

<b>EXPENSES (AWAY FROM HOME OVERNIGHT)</b>	
LODGING	
MEALS & TIPS	
OTHER (INCIDENTS, LAUNDRY, ETC.)	
CONVENTION FEES	
AIRPLANE OR TRAIN FARES	
AUTO RENTAL, TAXIES, BUS FARES	
<b>MEALS &amp; ENTERTAINMENT</b>	
BUSINESS MEALS	
GIFTS (LIMITED TO \$25 PER INDIVIDUAL)	
TICKETS	
TICKETS TO QUALIFIED CHARITABLE EVENTS	

<b>LEGAL/PROFESSIONAL FEES</b>	
attorney fees for business,	
accounting fees, bonds, permits	
<b>OFFICE EXPENSE</b> postage, stationary	
office supplies, bank charges, pens, etc.	
<b>PENSION/PROFIT SHARING</b> employees only	
<b>RENT/LEASE</b> truck lease	
machinery and equipment	
other business property, locker fees	
<b>REPAIRS MAINTENANCE</b> truck, equipment	
<b>SUPPLIES</b> maps, safety supplies	
small tools	
<b>TAXES</b> tolls	
scale fees	
licenses and permits	
fuel taxes	
highway use taxes	
real estate of business building and land	
payroll	
<b>TRAVEL</b> (number of nights away)	
City _____ Nights Out _____	
City _____ Nights Out _____	
City _____ Nights Out _____	
City _____ Nights Out _____	
City _____ Nights Out _____	
City _____ Nights Out _____	
City _____ Nights Out _____	

<b>UTILITIES &amp; TELEPHONE</b>	
ELECTRICITY (BUSINESS)	
NATURAL GAS/HEATING FUEL (BUSINESS)	
GARBAGE, WATER, SEWER (BUSINESS)	
TELEPHONE (BUS. LINE, SECOND LINE)	
BUSINESS LONG DISTANCE	
FAX TRANSMISSIONS, CELLULAR SERVICES	
<b>WAGES (Bring your copy of W-2s/941s)</b>	
WAGES TO SPOUSE	
CHILDREN UNDER 18	
OTHER	
<b>OTHER EXPENSES</b>	
BANK CHARGES	
DUES (UNION DUES)	
EDUCATION	
JOB RELATED TESTING	
LOADING/UNLOADING	
ROAD SERVICES	
TIRES/TUBES	
UNIFORMS/CLEANING	
WASHING/CLEANING	
OTHER	
OTHER	
OTHER	
OTHER	
OTHER	
OTHER	
OTHER	

▼ **EQUIPMENT PURCHASED** ▼

Radio, pager, cellphone, answering machine, other...

Item Purchased	Date of Purchase	Total Cost	Item Traded	Additional Cash Paid	Traded with related property	Other Information

1099s: Amounts of \$600 or more paid to individuals (not corporations) for rent, interest, or services rendered to you in your business, require information returns to be filed by payer.

Due date of return is January 31st. Nonfiling penalty can be \$150 per recipient. If recipient does not furnish you with his/her Social Security Number, you are required to withhold 31% of pmt.

Name	Address	Social Security #	Amount	Purpose of Payment

Sign Here \_\_\_\_\_