



President, Tax-Masters, Inc.

- 2,000 plus clients worldwide working in TV, Radio, Medicine, Real Estate, Law, Politics, and Professional Sports
- Staff of 20 CPA's, Enrolled Agents, Career Tax Specialists, and Certified Financial Planners

Media Experience

- Annual on-air personality for CSPAN's Washington Journal
- Resident Tax Expert for W. M. A. L. (ABC Radio)
- Weekly radio show, "Linda's Tax Tips and Listener Call In," for 20 years
- Regularly quoted and published in various real estate magazines nationwide

Our Firm

- Specializing in self-employed Realtors, Brokers, Investors, and Professionals
- We set up medical reimbursement plans to help our self-employed clients deduct family medical expenses from their real estate income.
- Full service financial planning. We can set up and manage your Solo 401k account or other retirement accounts
- IRS and State audit representation
- Free E-filing of Federal and State returns

Contact US

Web: www.Tax-Masters.com

Phone: 301-230-0200

Fax: 301-230-0203

Address: 6127 Executive Blvd
Rockville, MD 20852

Let us review your prior year's tax return. We may be able to save you some money!

Name _____

Income _____

Tax Year _____

PROFESSIONAL EXPENSES

Advertising / Marketing	
Business Cards	
Bank Charges	
Commissions Paid to Others	
Desk / Office Fees	
Insurance (Non Health)	
Legal Fees	
Office Expense	
Photocopying / Printing	
Business Meals / Entertainment	
Postage	
Rent	
Repairs	
Subcontracted Labor	
Supplies	
Wages	
Payroll Taxes	
Employee Benefits	
Benefit Plan Set-Up	

EQUIPMENT AND SOFTWARE

ITEMS	Cost	Date
Attache / Brief Case		
PDA / Blackberry /Smartphone		
Camera		
Mobile Phone		
Computer		
Fax machine / Scanner		
File Cabinets		
GPS Unit		
Office Furniture		
Printer / Copier		
Software		
Other _____		

PROFESSIONAL EXPENSES (CONTINUED)

Audio / Visual Aids	
Bookkeeping Fees	
Cards and Holiday Mailings	
Clerical	
Client Accommodations	
Client Gifts (\$25 per client per year)	
Continuing Education / Seminars	
Courier / FedEx	
Dues	
Licenses	
Maps / Books	
Memberships	
Online Marketing	
Publications	
Sales Assistants	
Software Subscriptions	
Tools	
401k / DB / SEP Management Fees	
Keys / Locksmiths / Lockboxes	
Insurance (Self Employed Health Ins.)	
Tax Prep Fees	
Other _____	
Other _____	

COMMUNICATION EXPENSES

Mobile Phone (Business Use)		See Note 1
Fax / Second Phone Line		See Note 1
Wireless Data		See Note 1
Webpage / Hosting		
Long Distance Fees		
Internet Service		

Note 1: You must have a separate personal cell/ phone/ wireless device or have the phone billed to your business account to claim 100% of this expense

Note: By completing this form you certify that the entries can be substantiated by documentation. You are advised to retain and possess all receipts and back up for at least 5 years after filing this year's tax return.

Name _____

Tax Year _____

Is the area used exclusively for Business? YES _____ NO _____

If the area is not exclusively used for business you cannot claim this deduction.

SELF-EMPLOYED BUSINESS USE OF HOME EXPENSES

	AMOUNT	REMARKS
Total Living Area in Home (Square Feet)		
Area Used for Business		
1 st Mortgage Interest		
2 nd Mortgage Interest		
Equity Line Interest		Enter total interest paid this year. Please provide principal amount of original loan and the amount used for improvement
Real Estate Taxes		
Home Owner's or Renter's Insurance		
General Repairs (Plumber, Electrician, Etc...)		Provide description, amount and date of repairs
Repairs to Office Area		Provide description, amount and date of repairs
Cleaning / Maintenance		Do not include lawn care / snow removal
Condo Fees / HOA Dues		
Rent Paid (If Renting)		
Utilities (Gas, Oil, Electric, Water)		
Trash Collection Fees		
Security System Monitoring		
Pest Control		
Other Expenses		

DETAILS REGARDING YOUR HOME

	AMOUNT	REMARKS
Purchase Price of Your Home		Please Provide a copy of your settlement sheet
Value of Land at Time of Purchase		We may be able to look this up for you.
Date of Purchase		
Date Placed in Service for Business Use		
Improvements		Provide description, amount and date of improvements

Note: By completing this form you certify that the entries can be substantiated by documentation. You are advised to retain and possess all receipts and back up for at least 5 years after filing this year's tax return.

Vehicle and Travel Expenses

Name _____

Tax Year _____

VEHICLE EXPENSES

Description of Auto	
Date Purchased	
Purchase Price (Including Tax)	
Date Placed in Business Use	
Odometer - BEGINNING OF YEAR	
Odometer - END OF THE YEAR	
Total Miles This Year	
Business Miles	
Commuting Miles	
Daily Average Round Trip Commute	
Personal Miles	
Is Car Leased?	
Is Car Owned?	
Depreciated in Prior Years? (Y / N)	
Gas / Oil / Lube	
Repairs and Maintenance	
Tires	
Towing	
Insurance	
Auto Lic / Tags	
Personal Property Tax	
Lease Payments	
Other _____	

VEHICLE EXPENSES (Continued)

Interest (Auto Loan	
Warranty	
Inspection	
Parking / Tolls	
Car Washes	
Auto Club Membership	
Other _____	

TRAVEL EXPENSES

Airfare / Train	
Car Rentals / Gas / Insurance	
Taxis / Buses / Shuttles	
Lodging	
Meals (While on Travel)	
Entertainment (While on Travel)	
Tips	
Telephone / Faxes	
Dry Cleaning (While out of town)	
Travel Agent Fees	
Number of Days out of town	
Other _____	
Other _____	

Note: By completing this form you certify that the entries can be substantiated by documentation. You are advised to retain and possess all receipts and back up for at least 5 years after filing this year's tax return.

Address of Property 1

Address of Property 2

Address of Property 3

	Property 1	Property 2	Property 3
Rent / Income Received			
Advertising			
Auto and Travel			
Cleaning and Maintenance			
Commissions / Fees			
Insurance / PMI			
Legal and Professional Fees			
Management Costs			
Mortgage Interest			
Other Interest			
Repairs			
Supplies / Tools			
Taxes			
Utilities			
Condo Fees			
Date Placed in Service			
Cost or Basis			
Value of Land			
Permanent Improvements			
Other Expenses			
Was the Property Sold this year	YES / NO	YES / NO	YES / NO

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