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Entertainment Industry Tax Organizer

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Name(s): _____ **Contact Phone #:** _____
Email Address: _____ **Filing/Marital Status:** _____
Mailing Address: _____ **City, State, Zip:** _____ **State Residence** _____

INCOME

Music Income Reported on 1099's	\$	Music Income not Reported on W-2's or 1099's	\$	Royalties	\$
Music Income W-2 Box (#1)	\$	Music Income W-2 (#2)	\$	Music Income W-2 (#3)	\$
Federal Tax Withheld W-2 (#1)	\$	Federal Tax Withheld W-2 (#2)	\$	Federal Tax Withheld W-2 (#3)	\$

ESTIMATED TAX PAYMENTS (if the 15th falls on a weekend, the due date is the following Monday) **Total \$** _____

On or before April 15	\$	On or before June 15	\$	On or before September 15	\$	On or before January 15 of the next year	\$
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PER DIEM (Receipt of Per Diem does not count as income, but offsets per diem deductions on Schedule C or Form 2106 Employee Business Expenses)

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ADVERTISING **Total \$** _____

Publication Ads	\$	Kinko's, Copying, Etc.	\$	Demo Costs	\$
Film	\$	Pictures/Film Developing	\$	Signs, Flyers	\$
Business Cards	\$	Fed Ex, UPS, USPS	\$	Website/Domain Name Reg.	\$

VEHICLE EXPENSES

Total Miles Driven		Commuting Miles*		Business Miles**	
Parking Fees	\$	Tolls	\$	Valet	\$

*Miles to your regular employment, be it a bus lot or venue.

**Temporary worksites, business related mileage and out of town mileage.

COMMISSIONS AND FEES **Total \$** _____

Agency Commissions	\$	Warehouse Memberships	\$	Management Fees	\$
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SUB-CONTRACT LABOR **Total \$** _____

Subs	\$	Band Members	\$	Drivers/Hired Help	\$
Producer/Audio Engineers	\$	Roadies/Techs	\$	Cartage	\$

INSTRUMENTS, COMPUTERS, EQUIPMENT **Total \$** _____

Instruments	\$	Amplifiers / Cabinets	\$	Computers & related Equipment*	\$
Office Equipment	\$	Stereo/HiFi Equipment	\$	Palm Pilot/Electronic Organizer	\$
Ear Monitors	\$	Road & Instrument Cases	\$	Line 6 / Rack Processing Gear	\$
Live Sound Equipment	\$	Studio Equipment & Monitors	\$	Major Computer Software	\$
Higher End Microphones	\$	PA Speaker Cabinets/Monitors	\$	MiniDisc/DAT Recorders	\$
Drums & Percussion	\$	Keyboards	\$	Camera for Business Use	\$
XM/Sirius Receiver	\$	Cymbals	\$	Drum Cases	\$
Drum Machine	\$	Portable DVD Player	\$	iPod/MP3 Player	\$

*computer deductible amount based on % of business usage

INSURANCE

Insurance On Gear	\$	Self-Employed Health Ins	\$	Business Property Ins., Other	
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TAXES AND LICENSES **Total \$** _____

Union Dues	\$	Business Licenses	\$	ASCAP/BMI Licensing Fees	\$
Copyright Fees	\$		\$		\$

LEGAL AND PROFESSIONAL **Total \$** _____

Prior Year Tax Preparation	\$	Recording Services	\$	Bank Fees when Traveling	\$
Business Bank Account Fees	\$	Hair/Make-Up*	\$	Manicures for Classical Guitarists	\$
Dry Cleaning	\$	Passport Fees	\$	Legal Fees	\$
Private Lessons	\$	Professional Website Design	\$	Gym Fees**	\$

*Professional-grade stage makeup only, general makeup such as Cover-girl and Avon too personal to deduct.

** Reserved for employer-mandated stage appearance, on-stage and on-film performers required to keep a certain weight and appearance, and dancers

OFFICE EXPENSE					Total \$ _____	
Pens/Pencils/Sharpies	\$	Fax/Computer Paper	\$	Ink Cartridges	\$	
Calendar	\$	Ledger Paper	\$	Blank/Typewriter Paper	\$	
Memo Pads / Notebooks	\$	Envelopes	\$	Staplers/Scissors etc.	\$	
Minor Office Equipment	\$	Packing Materials	\$	Tape	\$	
RENTAL					Total \$ _____	
Office/Studio Space	\$	Equipment Trucks	\$	Car Rentals	\$	
Tuxedos/Formalwear	\$	Rehearsal Hall	\$	Studio Time	\$	
NAMM Booth Rental	\$	Music Video/DVD Rentals	\$	Storage Locker/Space	\$	
P.O. Box Rental	\$	Equipment/Backline Rental	\$	Instrument Rental	\$	
REPAIRS					Total \$ _____	
Instrument Repairs	\$	Gear Repairs	\$	Office Equipment Repairs	\$	
Computer Repairs	\$	Electronic Repairs	\$		\$	
TRAVEL					Total \$ _____	
Hotel	\$	Flights	\$	Taxi (with tips)	\$	
Bus/Monorail	\$	Subway	\$	Train	\$	
	\$		\$		\$	
MEALS AND ENTERTAINMENT					Total \$ _____	
Tips	\$	In-Town Business Meals	\$	Entertainment	\$	
Per Diem Received from W-2 Jobs	\$	Per Diem Received from 1099, & Cash Jobs	\$	Total Days on the Road for Year		_____ days
BUSINESS USE OF HOME						
Square Footage of Home Used For Storage of Inventory or Equipment	_____ Sq ft	Square Footage of Home Used Exclusively For Business Or Office	_____ Sq ft	Total Square Footage of Home		_____ Sq ft
Price Paid For Home Minus Cost Of Land	\$	Date Home Was First Used For Business	Month/Year /	Rent Paid if Renting	\$	
Mortgage Interest Paid	\$	Real Estate Taxes Paid	\$	Repairs	\$	
Homeowner's Insurance	\$	Electric, Water, Sewer, Gas Etc	\$	Renovations	\$	
PHONE/INTERNET/WIRELESS UTILITIES					Total \$ _____	
Business Phone Line	\$	Fax Line	\$	Business Long Distance Calls	\$	
Calling Cards	\$	Toll Free 800 lines	\$	Internet*	\$	
Cell Phone Charges*	\$	Pager Service*	\$	Hotel Long Distance	\$	
Calls to Home for Messages	\$	Caller ID	\$	Touchtone*	\$	
Extras On Basic Phone Service*	\$	Cable*	\$	DCS/Satellite*	\$	
Fax Charges	\$	Sirius/XM Radio Subscription*	\$		\$	
<i>*50-75% of these expenses are normally allowed by the IRS. Also, your basic home phone service is not deductible, but extras are at the applied percentage rate</i>						
SUPPLIES					Total \$ _____	
General:					Subtotal \$ _____	
Address Book/Day Runner	\$	Batteries	\$	Blank Cassettes	\$	
Blank CDR's/DVD's	\$	Blank Videocassettes	\$	Blank DAT's/Recording Media	\$	
Blank Diskettes	\$	Briefcase	\$	Business Gifts Max. \$25 Each	\$	
Business Books	\$	Carrying Bags	\$	Cords/Cables/Connectors/AC	\$	
CD/Cassettes/LP's	\$	Computer Software (minor)	\$	Computer Parts (small)	\$	
Small Stage Props	\$	Duct Tape/Stage Tape	\$	Electric Fans	\$	
Fake Books & Sheet Music	\$	Film	\$	Footrest	\$	
Headphones	\$	Instructional tapes/videos	\$	Instrument Case Dehumidifiers	\$	
Luggage	\$	Light bulbs for stand/gear	\$	MIDI Cables	\$	
Music/Instructional books/videos	\$	Music Folders	\$	Music Stand	\$	
Magazine Subscriptions	\$	Metronome	\$	Maps	\$	
Parts	\$	Polish/Polish Cloths	\$	Performance Chair/Stand	\$	
Reading Light	\$	REPAIR Parts	\$	STAGE Makeup	\$	
Small Cases	\$	STAGE Clothes/Formalwear*	\$	Strings	\$	
Tools	\$	Tour Bus Supplies	\$	Travel Alarm Clock	\$	
Tuners	\$	Wheels and Cartage Equipment	\$	Staff Paper/Writing Paper	\$	
I-Tunes/Music Downloads	\$		\$		\$	

**For clothing/costuming to be deductible, it must be required formalwear, uniform, or be so outrageous/fragile that you would NEVER wear it in public, regardless of taste.*

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Symphony:				Subtotal \$ _____	
Batons	\$	Bow Hair	\$	Instrument Pads	\$
Instrument Polish	\$	Mouthpieces	\$	Polishing Cloths	\$
Reeds	\$	Rosin	\$	Stand Light	\$
Strings	\$	Slide/Valve Oil	\$	Neck Straps	\$
	\$		\$		\$
Percussion:				Subtotal \$ _____	
Drum Heads	\$	Sticks	\$	Mallets	\$
Drum Keys	\$	Cymbal Wing Nuts	\$	Replacement Hardware	\$
Headphones / Ear Buds	\$	Metronomes	\$	Drum Pedals	\$
Cymbal Polish	\$	Drum Polish	\$	Small Percussion	\$
Stands	\$		\$		\$
Guitars:				Subtotal \$ _____	
Amp Stands	\$	Guitar Straps	\$	Guitar Stands	\$
Knobs	\$	Pickups	\$	Volume/Tone Pots	\$
Picks	\$	Speaker Cables	\$	Raw Speakers	\$
Hardware	\$	Stomp Boxes & Pedals	\$	Tubes	\$
Capos	\$	¼" Jacks	\$	¼" Cables	\$
Guitar Parts	\$	Strings	\$	String Cutters/Tools	\$
String Winders	\$	Batteries	\$	Gig Bags	\$
Rack Bags	\$	Polish and Polish Cloths	\$	Tuners	\$
	\$		\$		\$
Keyboards, Piano:				Subtotal \$ _____	
Piano Tuning Tools	\$	MIDI Cables	\$	Stands	\$
Sound Cards	\$	Software	\$	Volume/Sustain Pedals	\$
Piano Bench/Stool	\$	Tip jar ☺	\$	Piano Polish	\$
Piano / Keyboard Parts	\$	¼" Cables	\$		\$
Impersonators, Singers, Dancers				Subtotal \$ _____	
Microphone	\$	Microphone Stand	\$	Stage Makeup	\$
Costumes***	\$	Wigs	\$	Shoes	\$
Stage Props	\$	Entertainer's Secret	\$		\$
Audio / Lighting Techs / Stagehands				Subtotal \$ _____	
Ohm Meter	\$	SPL Meter	\$	Cleaning Fluids and Materials	\$
Headphones	\$	Cable Ties	\$	CD/Tape Deck	\$
Cleaning Q-Tips, Cotton Balls	\$	Mic Cables	\$	¼" Cables	\$
Mic Stands	\$	Leatherman/Gerber	\$	Tools/Wrenches	\$
Flashlight	\$	Cable Tester	\$	Solder Gun, Solder, Accessories	\$
Blank Recording Media	\$	Light Gels	\$	Extension Cords	\$
Cheap Microphones	\$	CD's	\$	Batteries	\$
Floodlights	\$	Pyro	\$	Fog Juice	\$
Direct Boxes	\$	Lights	\$	Road Case Stencil	\$
Mic Shock Mounts	\$	Windscreens	\$	Notebooks/Notepads	\$
Razor Blades	\$	Sharpies	\$	Sound Reference Materials	\$
Speaker Cables	\$	Speakon/Neutrik Connectors	\$	Eye/Ear Protection	\$
Snake	\$	Raw Cable/Connectors	\$	Pocket Knife	\$
Tape Machine Cleaning Supplies	\$	Steel Toe Boots/Shoes	\$	Carabiners	\$

Notes

Additional Information & Downloads can be found on my website at www.MusicianTax.com