



Customer Client Profile Rev 1.1

Client Name: “John Stewart”

Business Type: “Sole Proprietor”

Summary of Prior Year: First Time Client

Goal Amount of Deductions: \$15,000 Qualified Deductions

Current W4 Allowances: 6

BUSINESS EXPENSE FOCUS STRATEGY

Home Office Deductions

Rent

Utilities(Gas)

Utilities(Power)

Utilities(Water)

Internet

Home Security System

***Homeowners **DO NOT** record mortgage payment. **Mortgage interest** and **Real Estate Taxes** will be used instead.

Schedule C Deductions

Advertising for Business

Cell Phone (Only business owner portion)

Dues & Subscriptions Tied to Business- (Multilevel Mastery, PAYS Access, PAYS personal dev't, Personal Viral Campaign System, Zoom)

Interest (Vehicle Used for Business/Credit cards only used for business)

Legal and Professional Services – Tax consultations

Meals

Meetings & Seminars- Event registrations

MyEcon Monthly Renewal

Office Expenses (equipment)

Office Supplies (ink, paper, etc)

Printing and Postage (only used for business)

Product Samples (only used for business)

Training & Education (only used for business)

Travel (Airfare,Lodging,Parking/Tolls,Public Transporattion,Rental car,Tips)

Vehicle Expenses (Gas,Insurance,Repairs & maintenance,Tires,property taxes)

Vehicle Mileage (personal & business miles)

Wages (Hiring Children Under 18)

Schedule E Deductions