

## Musicians Tax Organizer

Full Legal Name \_\_\_\_\_

Business Name (if any) \_\_\_\_\_

### Income Section

Number of 1099's submitted with form	
Additional Income not reported on 1099	\$
Royalties from BMI,ASCAP,SESAC	\$
Per Diems	\$
Lesson Income	\$
Product Sales (CDs, Videos, etc)	Complete Recording Artist Organizer
Other Musical Income	\$

### Expense Section

Advertising	\$
Agent / Referral Commissions	\$
*Contract Labor (substitutes etc)	Complete 1099 Misc Worksheet
Equipment Insurance	\$
Interest (business credit card, loans)	\$
*Attorney and Accounting Fees	Complete 1099 Misc Worksheet
Office (paper, pens, supplies)	\$
*Equipment Rental	Complete 1099 Misc Worksheet
*Practice Space / Office Rental	Complete 1099 Misc Worksheet
*Recording Studio Rental	Complete 1099 Misc Worksheet
Equipment Repairs	\$
Supplies (strings, picks, heads etc)	\$
Licenses	\$
Business Airfare	\$
Lodging	\$
Cab Fares, Parking, Misc Travel	\$
Meals / Entertainment (not per diem)	\$
Telephone	\$
Internet	\$
Website Hosting/Domain Names	\$

Books, CDs DVD for Research	\$
Special Required Clothing	\$
Dry Cleaning / Laundry	\$
Postage and Delivery	\$
Music Lessons, Other Education	\$
Health Insurance	\$
Other Expenses	\$

### Auto Expense Section

Business Miles before July 1	
Business Miles after July 1	
Total Miles (business and personal)	

#### If using the actual expense method:

Gas and Oil	
Maintenance	
Repairs	
Insurance	
Loan Interest	
Lease Payments	
License Fees	
Auto Club Membership	

- Did you purchase a new vehicle?                      yes    no
- Do you have a written record of mileage?                yes    no
- Do you have a vehicle for personal use?                yes    no

### Meals and Incidentals Section

Number of days on the road	
Multi-state tour?	yes    no
Overseas Travel?	yes    no
Have a log of travel dates and locations?	yes    no
Did you get reimbursed?	yes    no

\*count days on the road as one half day if you were at your home base at anytime during that day

### Business Use of Home Section

Complete questions for new clients or a change in circumstances

Used regularly and exclusively for business?	yes    no
Area of home in sq ft	
Area of office in sq ft	

Mortgage Interest	\$
Rent	\$
Insurance	\$
Utilities	\$
Maintenance	\$
Real Estate Tax	\$
Repairs	\$
Cleaning Expenses	\$

**This form is only a template and its purpose is to organize some of the data needed to complete your tax return. It does not replace the need for a one on one interview.**

**We request the completion of this form to make better use of our time during our interviews to focus on helping you manage your business.**

**Once completed, fax, email, or send the form along with your 1099s, W-2s and any other official tax documents you have.**

**You need not send receipts for your expenses, but it is your responsibility to keep all records and receipts to substantiate the claims we make on your tax return.**