

Tax Prep Checklist for Plumbers, Carpenters and Other Trades

Filing your business tax returns can be very complicated and overwhelming. This checklist will let you know what you need and help you get organized. This list will help us do our job. It is a concise, though not exhaustive, outline of some of the documents we will need when we meet with you.

Materials and Supplies

- Wood & Building Materials
- Piping & Plumbing Materials
- Paint & Associated Material
- Work Permits
- All Building Supplies
- All Plumbing Supplies
- All Painting Supplies
- Screws & Nails
- Work Boots & Clothing
- Sub-Contractor Labor
- Other: _____

Equipment & Repairs

- Electric Drills
- Electric & Manual Saws
- Hammers
- Tool Boxes
- Screwdrivers
- Flashlight
- Welders
- Pipe Cutters
- Brushes
- Spray Painters
- Repairs – Equipment
- Safety Equipment & Glasses
- Power & Hand Tools
- Computer & Printer
- Other: _____

Professional Fees & Dues

- Licenses
- Association Dues
- Union Dues
- Other: _____

Auto & Truck Use (in miles)

- Between 1st & 2nd Job
- Between Work Sights
- Mileage to Continuing Education
- Out of Town Work Trips
- Purchasing Equipment & Supplies
- Parking Fees & Tolls (\$)
- Personal Miles on Work Vehicle
- Cost of Vehicle
- Other: _____

Telephone Expenses

- Paging Service
- Pay Phone & Toll Calls
- On-line Services
- Cellular Calls
- Other: _____

Continuing Education

- Correspondence Course Fees
- Correspondence Courses
- Registration
- Seminar Fees
- Textbooks & Supplies
- Training Sessions of Suppliers
- Other: _____

Travel – Out of Town

- Airfare
- Car Rental
- Parking
- Bus, Taxi, Train & Subway
- Lodging (do not include with meals)
- Meals (do not combine with lodging)
- Hotel Tips
- Cleaning & Laundry
- Telephone Calls (including home)
- Other: _____

Miscellaneous

- Workers Comp. Insurance
- Legal & Advertising Fees
- Advertising
- Liability Insurance
- Other: _____