Name(s): ____

Date of your appointment: ______________ Time of appt.:____________

Tax Year ______

J. Capra Tax

Tax Preparation for Entertainers and Others
213-618-8135 <> www.CapraTax.com <> Jordana@CapraTax.com

❖ **Slow Down** ❖ **Breathe** ❖
❖ **For the love of gawd write Neatly** ❖
❖ **Check the Boxes** ❖ **Write-In your Details** ❖
❖ **YOU GOT THIS!** ❖

Once you have filled in the Capra Tax Packet *you could do this in December!* and have received ALL of your tax docs, THEN you can book our appointment on my website at the BOOK IT! **tab. Whether we meet in person via Zoom, or are working remotely, you MUST book an "In Person" or "Remote" timeslot.**

I must receive your <u>completed tax packet</u> and <u>ALL of your tax documents</u> no later than the day BEFORE your appointment. So, if you book with me on the 11th, I must receive everything no later than the 10th. That means you will <u>Mail</u> all of your copies to me 4 days before your appointment, or Email the PDFs no later than the day before your appointment.

If you email everything – MY PREFERRED METHOD – scan all of your tax documents, W-2s, 1099s, etc. into one PDF, and your Tax Packet worksheets into a second PDF and send everything in ONE EMAIL with <u>YOUR NAME 2024 TAXES</u> in the subject line. Either Password Protect the PDFs or use WeTransfer.com it's free, you don't have to password protect and only I can open it with my email! Easy!

If emailing PDFs isn't your thing, make COPIES and mail them to me using USPS Priority Mail (about $10.00) YOU KEEP THE ORIGINALS!! – Contact me for my address.

- Married Couples, please fill in <u>ONE</u> Tax Packet.
- I do <u>not</u> want to see your receipts. Signing the <u>Engagement of Services Agreement</u> (on the next pages) says that you added up, and can prove, your numbers.
- I do <u>not</u> want your spreadsheets. Transfer your numbers into the Tax Packet. I keep my prices low because you "do the math" ;~)
- I do <u>not</u> want your check stubs. I <u>DO</u> want you to **stack up your check stubs by payer, and make sure there's a W-2 or 1099 on top of each stack.** This way you can get any missing tax documents **<u>BEFORE</u>** making our appointment. (*See page 2 for an unexpected benefit!*)
- If you have an **<u>IRS IP PIN</u>** you MUST give a copy of that letter to me. You get a new one every year.
- Fill-in this Tax Packet in **December – *now there's a great idea!*** As soon as you get ALL of your income, investment, interest and other tax documents, then-and-only-then should you make our appointment.
- **You MUST be able to prove every number with receipts, not just bank statements …or guessing.**

PRE-APPOINTMENT CHECK LIST

PLEASE BRING, OR PRESENT ME WITH, **ALL** OF YOUR DOCUMENTS **AT ONE TIME**.

	yes / no:
Completely filled in Capra Tax Packet	Yes
Last year's tax return - *only if I didn't do it*	
Stack up your check stubs. Be sure you have **ALL** of your *W-2s **Your W-2 total:**	$
Stack up your check stubs. Be sure you have **ALL** of your *1099s **Your 1099 total:**	$
ALL CASH INCOME that you are **self-reporting**; Venmo, PayPal, personal check, Zelle, credit card, etc. – **write in here AND at the top of page 8**	$
Bank interest and dividends – 1099-INT, 1099-DIV	
Sale of stocks, bonds, mutual funds, etc. – 1099-B	
Unemployment – 1099-G	
Social Security – SSA-1099	
IRA Distributions – 1099-R	
Pension Distributions – 1099-R	
Summary from credit card transactions for funds you RECEIVE (*i.e. Square*) – 1099-K	
we advise you wait until your tax return is done: IRA Contributions	
HSA Contribution form 8889	
Health Insurance 1095-A, or B, or C	
Home Mortgage Interest, PMI, and Property Tax	
Student Loan Interest – 1098-E	
Tuition Expense – 1098-T	
Closing statements if you BOUGHT or SOLD PROPERTY	
Partnerships, Trusts and Corporations – K-1	

I can't say this enough; people in 'the biz' (and sometimes civilians) have several employers.
If you are missing even one W-2 or 1099, you will get a nasty'gram from the IRS & that State with an equally nasty bill attached.

PLEASE stack up your check stubs by payer, and make sure there is a W-2 or 1099 to go on the top of each stack.

Unexpected benefit: One year I had over $1,000 on a W-2 but there was no matching check stub, *the residual check never got to me*. I wouldn't have known to call to get the check if I hadn't matched my check stubs and tax docs!

ENGAGEMENT OF SERVICES AGREEMENT

J. Capra Tax

Tax Preparation for Entertainers and Others

213-618-8135 <> www.CapraTax.com

PRINT YOUR NAME(s): ____ DATE: __________________

This letter is to confirm our understanding of the terms and objectives of our engagement and the nature and limitations of the services I will provide. Our engagement is limited in scope and will be confined to the procedures and practices as set forth herein:

I will prepare, and if possible, eFile your Federal income tax return, and income tax returns for these U.S. STATE(S): ____, with supporting schedules, and perform related research as considered necessary (herein after known collectively as the "returns"). This engagement pertains only to the TAX YEAR _____________.

My engagement will be complete upon the delivery of the completed returns to you, unless you notify me that you require further tax services including, but not limited to, amendments, audit representation, extensions, past year returns, and any and all other services related to your income tax returns which you request.

The fees for my primary services are per, and as specified in, the accompanying schedule, and services not specifically identified therein will be based on an hourly rate of **$300 per hour** or the scheduled rate I publish for that time frame of the current tax year. Your actual client fees incurred will be based on the complexity of your returns, and the time necessary to complete such services.

Based on what can be anticipated for your present expressed needs, I ***estimate*** that the fees you will pay to Jordana Capra/ J. Capra Tax will range from **$300 - $900** (*see attached fee schedule on next page*) for preparing your Federal and any State income tax returns. This figure may change if more time and/or services other than written above prove to be needed, including services at a later date, such as preparing amendments and providing audit representation. If we anticipate our fees exceeding the aforementioned range, you will be presented the new fees in writing, so as to obtain your approval before continuing with the engagement.

Should my services for a given tax year extend for more than a one-year period, another Engagement of Services Agreement needs to be completed for each year of continuing work.

Please take special note that unless the processing of electronic filing is appropriate for your returns, you will be solely responsible to paper-file any returns I prepare for you with the appropriate taxing authorities.

I will furnish you with my Tax Packet Worksheets to guide you in gathering and understanding the necessary information required for your tax preparation. Your thorough completion and use of these worksheets provide for the most complete and accurate return, and assist me in keeping my fees to a minimum.

It is your responsibility to provide all the information required for the preparation of complete and accurate returns. I will not audit or otherwise verify the data you submit. Accordingly, my engagement cannot be relied upon to disclose errors, fraud or other illegal acts that may exist in the information you have provided. You are responsible for adopting sound accounting policies, for maintaining an adequate and efficient accounting system, for safeguarding assets, for authorizing transactions and retaining supporting documentation for those transactions, and for devising an internal control system that will help assure the proper preparation of financial statements.

Understand that should you choose to file a return in arrears of the current tax year, or when an amended return is appropriate, a refund is only available to you for 3 years prior to the current tax year.

Continued on next page…

ENGAGEMENT OF SERVICES AGREEMENT continued

In addition to the information you have entered in the Tax Packet, or other papers you may provide, you further acknowledge that to the best of your knowledge and belief during the interview/preparation process you have provided accurate, complete and full disclosure in your answers to any and all questions regarding income, expenses, deductions and exemptions in an effort to ensure that your return is prepared accurately.

To the extent I render any accounting and/or bookkeeping assistance, it will be limited to those tasks I deem necessary for the preparation of the returns and may lead to additional costs. Therefore, your commitment is essential to my ability to complete this engagement. Specifically, I must receive comprehensive information from which to prepare your returns within a reasonable period of time.

If, during our work, I discover information that affects your prior-year tax returns, I will make you aware of the facts. However, I cannot be responsible for identifying all items that may affect your prior-year returns. If you become aware of such information during the year, please contact me to discuss the best resolution of the issue.

It is always possible your returns may be selected for review (audit) by one or more taxing authority. Any proposed adjustments by the examining agent are subject to certain rights of appeal. In the event of such tax examination(s), I will be available upon your written request to represent you during the examination and/or during any appeal for an additional hourly fee.

You should retain all the documents, receipts, records, canceled checks and other data that form the basis of income and deductions for at least Seven Years. These may be necessary to prove the accuracy and completeness of the returns to a taxing authority. You have the final responsibility for the income tax returns and, therefore, you should review them carefully before you sign the returns and/or the e-file Signature Authorization Forms.

This engagement letter is contractual in nature, and includes all of the relevant terms that will govern the engagement for which it has been prepared. The terms of this letter supersede any prior oral or written representations or commitments by or between the parties. Any material changes or additions to the terms set forth in this letter will only become effective if evidenced by a written amendment to this letter, signed by all of the parties.

In acknowledgment and acceptance of these terms and considerations, and as client(s) of Jordana Capra / J. Capra Tax,
(I) (we) hereby enter (my) (our) signature(s).

TAXPAYER SIGNATURE: ____ DATE:__________________

SPOUSE SIGNATURE: ____ DATE:__________________

RATE SCHEDULE

Based on a 90-minute tax return

January – February
$300

March 1 – 15
$350

March 16 – 31
$400

April – December
(and prior years) $450

Take advantage of my incentivized pricing!
For complex returns with multiple income sources and expenses that go on different schedules, you won't find a professional to do your tax return for less than $900

Married Filing Joint
add $100

Single Member LLC
Add $300

Additional States add
$50 per state

Additional Time at $300 per hour
Charged in 15-minute increments

TAX DAY EXTENSIONS $50 > PRIOR TO Tax Day - Paid at the time of request

A $50 cancellation fee will be charged for cancellations made within 24 hours – Paid at the time of cancellation
I must have your completed Tax Packet & ALL Documents 24 hours BEFOR your appointment.

IF YOU ARE MARRIED – PLEASE SHARE ONE PACKET

PRIMARY NAME ______________________________

*fill in info below, **ONLY** if you are **NEW** or info has changed:*

Occupation ______________________________

Soc. Sec. # ______________________________

Date of Birth Month / Day / Year ______________________________

Cell Phone ______________________________

Home Phone ______________________________

Email ______________________________

SPOUSE NAME ______________________________

*fill in info below, **ONLY** if you are **NEW** or info has changed:*

Occupation ______________________________

Soc. Sec. # ______________________________

Date of Birth Month / Day / Year ______________________________

Cell Phone ______________________________

Home Phone ______________________________

Email ______________________________

Address Unit # Zip Code City

Driver's License # ______________________ State ________

Issue date________________Exp. date ______________

NY'ers Docu # ______________________________

Driver's License# ______________________ State ________

Issue date________________Exp. date ______________

NY'ers Docu # ______________________________

❑ SINGLE

❑ MARRIED / JOINT

❑ MARRIED FILING **SEPARATE**
Incl. Spouse Name,
SSN & DOB above

❑ WIDOW(ER)
Date __________

❑ HEAD of HOUSEHOLD
Must be Single with
one or more dependents

DEPENDENT INFORMATION Enter the dependent Code in the first column

L = Child who lived with you N = Child who did not live with you due to divorce or separation O = Other Dependent

CODE	FULL NAME	SOCIAL SECURITY NUMBER	RELATIONSHIP	DATE OF BIRTH	# MONTHS LIVED W/ YOU LAST YEAR

CHILD CARE EXPENSES DAY CARE OR PRE-SCHOOL, BUT NOT OTHER EDUCATION (use addl. sheet if necessary)

(1) Care Giver ______________________ Federal ID # ________________ $__________

Address ______________________________ Phone______________

(2) Care Giver ______________________ Federal ID # ________________ $__________

Address ______________________________ Phone______________

IRS IP PIN? PRIMARY: SPOUSE: KID #1: KID #2:

BANK INFO ~ FOR ELECTRONIC REFUND OR AMOUNT DUE

❑ **CHECK THE BOX IF BANK INFO IS THE SAME AS LAST YEAR**

*fill in **ONLY** if you are **NEW** or your bank info has **CHANGED**:*

Bank Name________________ Routing #______________ Account #________________

Account Type: ❑ Checking ❑ Savings Name(s) on account ______________________________

❖ **HEALTH INSURANCE** check one box:

❑ I had Covered CA or other Government Marketplace Insurance. How many months were you covered? ___________

You MUST give me your form 1095-A

❑ I had employer offered health insurance (for example SAG-AFTRA). How many months were you covered? ___________

❑ I had privately purchased health insurance. How many months were you covered? ___________

❖ **CHILD TAX CREDIT / DEPENDENT** if you are claiming a child on your tax return you MUST give me a document for EACH child that includes (A) their name and (B) Your name, and/or (C) at least the last 4 digits of their SSN, for example, their Birth Certificate, Health Insurance Form, Social Security Card and I need a new copy EVERY year that you claim the child.

>> Speaking of I.D., please make a one-page copy of your social security cards and your driver's licenses or other state issued photo I.D., and send along with your documents to me. (*It's also smart to keep a copy of your IDs and credit cards in a safe place*)

❖ **EXTENSIONS**

Did you file any EXTENSIONS for your 2024 tax return? ❑ Yes ❑ No

Did you make any payments WITH the extension? Fed $__________ <> State $__________ What State(s)___________________

❖ **>>> CRYPTO CURRENCY <<<**

Did you mine, buy, sell, use or just hold any virtual or crypto currency? ❑ Yes ❑ No

---

Take advantage of my **INCENTIVIZED PRICING!** (prices are based on a 90 min. tax return)

Jan – Feb = $300
Mar 1-15 = $350
Mar 16-31 = $400
Apr – Dec = $450 (and all prior years)
Extensions = $50 – at the time of the request

Married Filing Joint = $100 additional
Extra States = $50 each
SMLLC = $300 *…if you don't know it, you don't have it*
Overtime = $300 per hour, including consultations, amended returns, and non tax return work

$10 charge if you want a folder mailed to you which will include your tax return on paper and a flash drive.
$50 if you need *another* copy after you are e-filed.

A $50 cancellation fee will be charged for cancellations made within 24 hours at the time of cancellation.

RENTAL or DRIVING INCOME or SINGLE MEMBER LLC? Download and fill in those worksheets.

ESTIMATED TAX PAYMENTS TOWARD YOUR 2024 TAX BILL

(IF YOU DON'T KNOW WHAT THIS IS, YOU DIDN'T MAKE ANY)

	FEDERAL	STATE	LOCAL
Quarter 1 = before 4-15-2024	$	$	$
Quarter 2 = before 6-15-2024	$	$	$
Quarter 3 = before 9-15-2024	$	$	$
Quarter 4 = before 1-15-2025	$	$	$
TOTAL	$	$	$

EVERYONE SHOULD FILL OUT THIS PAGE IF MARRIED FILING JOINT COMBINE YOUR NUMBERS

SELF PAID HEALTH INSURANCE including long term care, Medicare **supplemental**, but **not** life insurance , and Not from your W-2 or Soc. Sec. form	$
MEDICAL EXPENSES not reimbursed by insurance. i.e. co-pays, dental, vision, glasses, therapy, prescriptions, PPE, ambulance, parking at medical facilities…	$
HOME MORTGAGE INTEREST	$
REAL ESTATE TAXES AKA **PROPERTY TAX**	$
PRIVATE MORTGAGE INSURANCE	$
INVESTMENT & LEGAL EXPENSES FOR BUSINESS (not a will, or marriage, or divorce or anything personal) write-in YOUR details:	$
EDUCATOR EXPENSES **K–12 Full-Time teachers ONLY, to the max of $300**	$

		PRIMARY	SPOUSE
RETIREMENT PLAN CONTRIBUTIONS	TRADITIONAL =	$	$
Please wait to make any contribution until I do your Tax Return, you have until	SEP =	$	$
Tax Day to contribute for last year. (Do Not include 401-K money from your W-2)	ROTH =	$	$

- **You MUST include the 501(c)(3) I.D. number. No Go-Fund-Me's, and political contributions don't count either.**
- **Did you contribute to a friend's fund-raising for their Indy project? Put that on P. 8 in advertising.**
- **Please combine if multiple donations to the same recipient.**

Name of charity: Contributions of **FUNDS**	501(c)(3) E.I.N.	Date	Amount
			$
			$
			$
			$
			$
use additional sheet if needed		**TOTAL**	**$______________**
Name of charity: Contributions of **GOODS**		Date	Amount
			$
			$
			$
			$
			$
use additional sheet if needed		**TOTAL**	**$______________**

ALIMONY / SPOUSAL SUPPORT - If you finalized your divorce after January 1, 2019, the *#45 administration* eliminated the Federal deduction benefit, and reporting requirements of **alimony / spousal support**.

> If your divorce was finalized in 2018 or earlier, > What did you **pay** in spousal support last year $____________________

> What is your ex's SSN ________________________ > What did you **receive** in spousal support last year $____________________

> CA still allows this deduction and requires you to report the income. Check to see if your (other) state does as well.

WARNING: Are you a SIGNATORY on ANY accounts outside the U.S.?

At any time during the last year, did you have a foreign account that had a value, *for even one day*, of $10,000 U.S. Dollars or more? Then you MUST fill in the FBAR form available at http://BsaeFiling.fincen.treas.gov/main.html

I am not responsible for filing in this form - You are.

SELF-REPORTED INCOME and ALL BUSINESS DEDUCTIONS

print additional pages as needed

		❑Primary ❑Spouse Business 1	❑Primary ❑Spouse Business 2	
	What is the BUSINESS NAME/TYPE:			
	INCOME you are **SELF-REPORTING** ***(NOT from any 1099 or W-2)***	$	$	
17	LAST YEAR'S TAX PREPARATION COSTS			**Does this expense help you earn:**
8	BUSINESS GIFTS Amounts are still limited to $25 per person, per year			W-2 ❑ 1099 ❑ Both ❑
8	ADVERTISING & PUBLICITY website, business cards, post cards, reels, headshots...			W-2 ❑ 1099 ❑ Both ❑
10	COMMISSIONS & FEES call your rep to get real numbers, don't just take X% of your income			W-2 ❑ 1099 ❑ Both ❑
10	ON-LINE JOB SEARCH REGISTRIES i.e. IMDB, Actors Access, Casting Networks, theatre co. dues			W-2 ❑ 1099 ❑ Both ❑
11	CONTRACT LABOR YOU PAID OUT Did you pay a crew or anyone to help you earn income			W-2 ❑ 1099 ❑ Both ❑
15	INSURANCE TO DO THIS JOB not health ins.			W-2 ❑ 1099 ❑ Both ❑
18	OFFICE SUPPLIES ink, printer paper, postage, cloud storage, software, etc.			W-2 ❑ 1099 ❑ Both ❑
18	POST OFFICE BOX >>> this is a seriously smart idea <<<			W-2 ❑ 1099 ❑ Both ❑
20 A	EQUIPMENT LEASE OR RENT WRITE-IN DETAILS:			W-2 ❑ 1099 ❑ Both ❑
20 B	OFFICE / THEATRE / STUDIO RENTAL i.e. rehearsal space, **NOT** where you live			W-2 ❑ 1099 ❑ Both ❑
21	EQUIPMENT REPAIR / MAINTENANCE WRITE-IN DETAILS:			W-2 ❑ 1099 ❑ Both ❑
21	COSTUME REPAIR / MAINTENANCE WRITE-IN DETAILS:			W-2 ❑ 1099 ❑ Both ❑
21	SUPPLIES FOR RESEARCH / JOB SEARCH WRITE-IN DETAILS:			W-2 ❑ 1099 ❑ Both ❑
21	COST OF MERCHANDISE for Sale or Promo WRITE-IN DETAILS:			W-2 ❑ 1099 ❑ Both ❑

LIST OF BUSINESS DEDUCTIONS **CONTINUES** ON NEXT PAGE

BUSINESS DEDUCTIONS **CONTINUED**

		❑Primary ❑Spouse Business 1	❑Primary ❑Spouse Business 2	**Does this expense help you earn:**
22	PURCHASE of PROFESSIONAL COSTUMES & UNIFORMS NOT general street wear; MUST BE: doctor, clown. **MUST be tied to an audition or gig**			W-2 ❑ 1099 ❑ Both ❑
22	PROFESSIONAL MAKE-UP, HAIR, NAILS and supplies - **MUST be tied to an audition or gig**			W-2 ❑ 1099 ❑ Both ❑
23	TAXES, LICENSE, CERTIFICATION FEES WRITE-IN DETAILS:			W-2 ❑ 1099 ❑ Both ❑
27	SELF-TAPES, AUDITION EXPENSE WRITE-IN DETAILS:			W-2 ❑ 1099 ❑ Both ❑
27	PROFESSIONAL COACHING acting, voice, dance… WRITE-IN DETAILS:			W-2 ❑ 1099 ❑ Both ❑
27	CONTINUING EDUCATION Not already reported on a form 1098-T			W-2 ❑ 1099 ❑ Both ❑
27	2nd PHONE LINE, FAX LINE WRITE-IN DETAILS:			W-2 ❑ 1099 ❑ Both ❑
27	CELL PHONE **TOTAL** for your phone for the whole year **What percentage is for business: %**			W-2 ❑ 1099 ❑ Both ❑
27	INTERNET **TOTAL** for the whole year **What percentage is for business: %**			W-2 ❑ 1099 ❑ Both ❑
2106 / 27	RESEARCH VIEWING cable, streaming, concerts, live theatre, movies, etc. **TOTAL** for the whole year **What percentage is for business: %**			W-2 ❑ 1099 ❑ Both ❑
	UNION DUES & INITIATION FEES - INCLUDE ADDITIONAL 2% AEA DUES			W-2 ❑ 1099 ❑ Both ❑
	OTHER WRITE-IN DETAILS:			W-2 ❑ 1099 ❑ Both ❑
	OTHER WRITE-IN DETAILS:			W-2 ❑ 1099 ❑ Both ❑
	OTHER WRITE-IN DETAILS:			W-2 ❑ 1099 ❑ Both ❑

- **In the unlikely event of an audit, YOU MUST be able to prove EVERY number with receipts.**
- **Numbers should not all end in double zeros i.e., $600, $2700, $3500 this is VERY RED-FLAGGY!**
- **The ONLY rounding up or down is at the fifty-cent point. $2.49 becomes $2. and $2.50 becomes $3.**

  …The IRS doesn't do change, literally or figuratively.

EQUIPMENT EXPENSE

Only Items costing over $500 and at least 55% of business use

Any less expensive items should be added to "office supplies" or "supplies for research/job search" on page 8

Use additional sheet if necessary.

		ITEM DESCRIPTION	PURCHASE DATE	COST TIMES % OF BIZ USE	NET WRITE-OFF
☑ Primary ❑ Spouse	☑ W-2 ☑ 1099	EXAMPLE: Brother all in one Printer / Scanner	April 13	$ 500 X .55 % =	$ 275
❑ Primary ❑ Spouse	❑ W-2 ❑ 1099			$ X % =	$
❑ Primary ❑ Spouse	❑ W-2 ❑ 1099			$ X % =	$
❑ Primary ❑ Spouse	❑ W-2 ❑ 1099			$ X % =	$
❑ Primary ❑ Spouse	❑ W-2 ❑ 1099			$ X % =	$
❑ Primary ❑ Spouse	❑ W-2 ❑ 1099			$ X % =	$

this is the **"I DON'T KNOW WHERE IT GOES"** section*!*

		DESCRIPTION OF **BUSINESS** EXPENSES	DATE	COST
❑ Primary ❑ Spouse	❑ W-2 ❑ 1099			$
❑ Primary ❑ Spouse	❑ W-2 ❑ 1099			$
❑ Primary ❑ Spouse	❑ W-2 ❑ 1099			$
❑ Primary ❑ Spouse	❑ W-2 ❑ 1099			$
❑ Primary ❑ Spouse	❑ W-2 ❑ 1099			$

OFFICE IN THE HOME

This space must be used **exclusively** for business;
administration, billing, seeing clients, storing business materials, self-tapes, v.o. booth…

	Primary	Spouse
(i.e. 10'x10' = 100 sq. ft.) total square footage of your workspace		
total square footage of your residence		
renters or homeowners' insurance		
total RENT *(not mortgage payments)* for the year		
total of all utilities for the year		
other home office expenses –WRITE-IN DETAILS:		

TRANSPORTATION EXPENSES

*You must have **business** miles, or this page doesn't apply to you*

	CAR 1	CAR 2
year - make – model:		
date placed in service	month / day / year / /	month / day / year / /
❑ Primary ❑ Spouse (Car 1) odometer readings Jan. 1st 2024:__________________ Dec. 31st 2024:___________________		
❑ Primary ❑ Spouse (Car 2) odometer readings Jan. 1st 2024:__________________ Dec. 31st 2024:___________________		
TOTAL MILES driven in 2024		
driving in **PURSUIT OF**, or to expand, your business, skills, knowledge, network, i.e. acting classes, agent/producer meetings, are BUSINESS MILES		
total miles to **DO 1099 / Independent Contractor work** TOTAL 1099 MILES		
driving to and from all **W-2 jobs** are COMMUTING MILES		
one typical ROUND TRIP to your W-2 job, regular job or side-hustle gig		
driving to and from the doctor, treatments, pharmacy are all miles for MEDICAL		
miles to volunteer at a charity or a fundraiser, or donate goods, (but **not** going to worship) are CHARITY		
Ya' gotta have some miles that are just PERSONAL		
parking when in PURSUIT OF BUSINESS (NOT at your regular job) PARKING FEES	$	$
Uber, Lyft, cab, train, bus fare to pursue, or get to gig-work, (NOT PERSONAL) TRANSPORTATION EXPENSE	$	$

- Anyone who has ever been AUDITED is a big believer is in DOCUMENTING their BUSINESS MILEAGE. You can use a phone app, a mileage log *(download mine from my website)* or a calendar. Be consistent.
  Auditions, meetings, business meals, and classes/training are all *examples* of BUSINESS MILES.

ACTUAL VEHICLE EXPENSES	CAR 1	CAR 2
gas, oil, repairs, insurance, etc.	$	$
rental vehicles	$	$
price or fair market value of your car	$	$
date of PURCHASE / LEASE **(circle one)**	month / day / year / /	month / day / year / /
LEASE payments (**NOT** purchase payments)	$	$
if **last year**, down payment on a LEASE	$	$

- Did you buy or lease a new car LAST year? Bring in the sales/lease agreement.

TRAVEL OUT OF TOWN for INTERVIEWS & WORK

(MORE THAN 50 MILES FROM HOME - - use addl. sheet if needed)

		employer & purpose	kind of work	dates from / to	# of days for work	city / state, or city / country
1	❑ Primary ❑ Spouse		❑ 1099 ❑ W-2			
2	❑ Primary ❑ Spouse		❑ 1099 ❑ W-2			
3	❑ Primary ❑ Spouse		❑ 1099 ❑ W-2			
4	❑ Primary ❑ Spouse		❑ 1099 ❑ W-2			
5	❑ Primary ❑ Spouse		❑ 1099 ❑ W-2			

EXPENSES	trip 1	trip 2	trip 3	trip 4	trip 5
air fare, train, bus, luggage fees…	$	$	$	$	$
hotel, motel, hostel, tents…	$	$	$	$	$
local transportation - cabs, lyft/uber, rental car, parking…	$	$	$	$	$
passport fees, TSA fees, real-id fees…	$	$	$	$	$
other write-in details:					
TRAVEL (not Meal) TOTALS	$	$	$	$	$

MEALS	trip 1	trip 2	trip 3	trip 4	trip 5
actual meal and incidental expenses including tips	$	$	$	$	$
minus per diem received	$	$	$	$	$
Equals:	$	$	$	$	$

❑ **Primary**	**TOTAL 1099 TRAVEL (DON'T INCLUDE MEALS) $**	**TOTAL W-2 TRAVEL (DON'T INCLUDE MEALS) $**	**TOTAL 1099 MEALS (DON'T INCLUDE TRAVEL COSTS) $**	**TOTAL W-2 MEALS (DON'T INCLUDE TRAVEL COSTS) $**

❑ **Spouse**	**TOTAL 1099 TRAVEL (DON'T INCLUDE MEALS) $**	**TOTAL W-2 TRAVEL (DON'T INCLUDE MEALS) $**	**TOTAL 1099 MEALS (DON'T INCLUDE TRAVEL COSTS) $**	**TOTAL W-2 MEALS (DON'T INCLUDE TRAVEL COSTS) $**

❖ **In the unlikely event of an audit, YOU MUST be able to prove EVERY number with receipts.**

for office use only; GSA allowances					
whole day range	b'fast	lunch	dinner	incidental	1st/last day
$55	$16	$14	$23	$5	$41
$66	$16	$17	$28	$5	$50

BUSINESS MEALS & ENTERTAINMENT FOR BUSINESS

A business meal or event must be WITH another person who can expand your knowledge, skill set, or network. *(ye old spouse doesn't count)*

You must be able to back up the business meals and events, thank-you's and please-hire-me's, with entries in your calendar, mileage log, and with actual receipts that include name – date – purpose – location – amount:

Primary Tax Payer's list:

NAME (person entertained)	W-2 / 1099	PURPOSE	LOCATION	AMOUNT
Example: Jordana Capra	1099	Talk taxes!	Nat's Early Bite	$ 38.
				$
				$
				$
				$
				$
				$
				$
			W-2 SUB-TOTAL	$
			1099 SUB-TOTAL	$
			From p. 12 W-2 TRAVEL MEALS	$
			1099 TRAVEL MEALS	$
			PRIMARY W-2 TOTAL	$
			1099 TOTAL	$

Spouse's List:

NAME (person entertained)	DATE	PURPOSE	LOCATION	AMOUNT
				$
				$
				$
				$
				$
				$
				$
			W-2 SUB-TOTAL	$
			1099 SUB-TOTAL	$
			From p. 12 W-2 TRAVEL MEALS	$
			1099 TRAVEL MEALS	$
			SPOUSE W-2 TOTAL	$
			1099 TOTAL	$

MAKING ESTIMATED QUARTERLY TAX PAYMENTS TOWARD THIS YEAR'S TAX BILL:

Go to **IRS.gov** (or call 1-800-829-1040)
Make a Payment
Bank Account (Direct Pay)
>>>do NOT choose debit or credit card –
they attach stupid fees!<<<
Make a Payment ...again...
REASON pull down to ESTIMATED TAX
Apply Payment to 1040 (for 1040 1040A, 1040EZ)
follow the instructions from there.
Look at what you earned in the last quarter, and make a payment of 20%.
You MUST do this on or BEFORE
April 15,
June 15th, (yes June – google it)
Sep 15th and
Jan 15 (for the last quarter of the previous tax year.)

Go to **FTB.CA.gov** (or call 1-800-852-5700)
Make a Payment
Bank Account
>>>do NOT choose debit or credit card –
they attach stupid fees!<<<
Use Web Pay Personal
Enter your personal info,
choose Estimated Tax Payment (Form 540 - ES)
Again, look at what you earned in the last quarter, and make a payment of 5%.
You MUST do this on or BEFORE
April 15,
June 15th, (yes June – google it)
Sep 15th and
Jan 15 (for the last quarter of the previous tax year.)

PAYING OFF PAST YEARS TAX BILLS:

Go to **IRS.gov** (or call 1-800-829-1040)
MAKE A PAYMENT
BANK ACCOUNT (Direct Pay) never choose credit or debit as they attach stupid fees.
MAKE A PAYMENT ...again
Select a Reason, scroll down to TAX RETURN OR NOTICE
Select Type, choose 1040, 1040A, 1040EZ
The rest is pretty self-explanatory

Go to **FTB.CA.gov** (or call 1-800-852-5700)
MAKE A PAYMENT
BANK ACCOUNT (NOT credit card – again stupid fees)
PAY BY BANK ACCOUNT
USE WEB PAY PERSONAL
Enter the requested info, then choose
TAX RETURN PAYMENT
The rest is pretty self-explanatory

Jordana Capra is a CTEC Registered Tax Preparer. This is being presented so that you are aware of the Tax Preparer Code of Conduct and Responsibilities as established by the California Tax Education Council. All CTEC certified tax preparers - -

- Must register as a tax preparer with the California Tax Education Council (CTEC).
- Must not violate provisions of Sections 17530.5 or 7216 of Title 26 of the United States Code prohibiting tax preparers from disclosing any information obtained in the business of preparing federal or state income tax returns unless (1) consented to, in writing, by the taxpayer in a separate document; (2) expressly authorized by law; (3) necessary for the preparation of the return; and, (4) pursuant to court order.
- Must maintain a $5,000 Tax Preparer Bond issued by a surety company admitted to do business in California. A tax preparer shall provide to the surety company proof that he or she is at least 18 years of age before a bond can be issued.
- Must not conduct business without having a current surety bond in effect.
- Must furnish evidence of a current bond upon the request of any state or federal law enforcement agency.
- Must not fail to sign a customer's tax return when payment for services rendered has been made.
- Must not fail to return, upon the demand by or on behalf of a customer, records or other data provided to the tax preparer by the customer.
- Must, prior to rendering any tax preparation services, provide the customer, in writing, with the tax preparer's name, address, telephone number, and evidence of compliance with the bonding requirement.
- Must complete, on an annual basis, not less than 20 hours of continuing education from an approved curriculum provider: (10 hours federal tax law, 2 hours ethics, 3 hours federal tax update and 5 hours California).

Jordana Capra / J. Capra Tax
www.CapraTax.com
213-618-8135

Bonded with Merchants Bonding Co.
CTEC # A237088
PTIN # P01452416

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Est. Circa 2011