TAX DATA ADDENDUM

- Page 5 Auto Mileage & Expense Info, Home Sale
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- Page 7 Rental or Farm Income & Expenses
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Auto Mileage and Expense	Information			
Note: if you use your vehicle for w			the expenses of	f operating your vehicle or the
Standard Mileage rate. The most of	• • •		•	, •,
method, you cannot deduct <i>any</i> of				
Standard Mileage Method	·			
Auto Make	Auto Model	<u> </u>	Auto \	Year
Date auto placed in service				
Taxpayer has another vehicle avail	able for persona	l use 🗖 Yes 🗖 No		
Taxpayer has vehicle available for i	use during off du	ity hours 🔲 Ye	s 🗖 No	
Taxpayer has written evidence to s	upport this dedu	uction 🔲 Ye	s 🗖 No	
Total miles driven	Total bus	iness miles driven _		
Total personal miles driven includi	ng commuting m	iles		
Auto Expenses Method				
Garage rent \$	Repairs	\$	Loan Interest	t \$
Gas \$	Insurance	\$	Tires	\$
Rental fees \$	Oil	\$	Tolls	\$
Licenses & Tag \$	Registration	\$	Parking fees	\$
Auto customizing \$	Other			\$
Prior Years Mileage				
-				
Business Total Miles driven				
House Sold in 2024				
Address of House				

Was this house your principal residence?
Yes Vacation Home?
Yes Rental or business?
Yes Date of Purchase _____ Purchase Price \$_____ Date of Sale _____

Was home depreciated in prior years? **QYes QNo** What is cost of Land house sits on? \$______

Sales Price \$_____ Was property sold depreciated over the years?

Yes
No

Moving Expenses — Please read and confirm that you qualify to deduct your moving expenses. If you do, based on the criteria below, then answer the questions that follow for us to deduct your moving expenses.

Limits:

You can deduct the cost of moving expenses that exceed any reimbursements from your employer. You must meet the qualifications to claim this tax deduction.

Qualifications:

Your move must be because <u>you started a new job</u>. You must meet the distance and time tests. However, if you are relocating to the United States from another country as a retiree, you can deduct your moving costs without needing to start a new job in the USA. In other words, retirees from abroad do not need to meet the time test.

Distance Test:

Your new job is located at least 50 miles further from your old home than the distance between your old home and your old job. For example, let's say you commuted 25 miles from your old house to your old job. Now, you found a new job 75 miles away from your old house. Your commute to your new job is at least 50 miles further than your old commute (75 miles as compared to 25 miles). If you move, you can deduct your moving expenses.

Time Test:

Please write additional notes or information concerning your tax return if needed to help the tax preparer

Is the person renting property related to You? \(\text{Property Address (1)} \) (2) (3) Date of rental (1) to (2)\$ Advertising \$ Auto & travel Cleaning \$ Commissions (real estate) Property Insurance Legal & professional fees \$ Management Fees	Home or Farm (Rental), Rental Income (1)st Prope	=					=
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	Please write additional	notes or i	nformation cond	erning your t	ax return if need	ded to help the	tax prepare

Please write additional notes or information concerning your tax return if needed to help the tax preparer.				

Form 8829 – Office in Home:	office must be exclusively used for busine	ess.
Fair Market Value of Home \$	Value of Land \$	
Square foot of home actively used in business		
Total square foot of home		
Gross Income from business (we can complete	this amount on your behalf)	
Deductible mortgage interest (includes but	usiness related home equity line)	\$
Real estate taxes		\$
Tax assessment		\$
Homeowners association		\$
Homeowners Insurance		\$
Repairs (Hot water heater, sprinkler system	, handyman, etc)	\$
Maintenance (security system, pest control lawn service, etc.)		\$
Home Electric bills		\$
Water & Garbage		\$
Home renovations (painting work area, new	v shelfing, adding new office)	\$
Notes or Questions		
Please put any questions about any other podeductible?	otential home office deductions that you thin	k that you think may be