

Employee Business Expense Questionnaire

(for filing form 2106)

SSN on form 2106: _____

Address where you reported for work:

Your job description and responsibilities (If you are assigned a territory, please indicate the geographic area here.):

How were the figures on the return determined?:

Were you assigned to different locations during the year: YES NO

If yes, indicate locations and dates you were there: _____

List any business trips taken or conventions attended during the year:

Describe the types of records maintained for travel and transportation expenses:

If you deducted an amount for vehicle expenses:

Number of cars available for business and personal use _____ & Number of licenses drivers in family _____

Describe the use of the car for vacations or other personal trips:

Distance to and from your home to your job _____ & the number of days you report to work each week _____

Required:

- A copy of your employer's reimbursement policy, a statement that there is no reimbursement policy or a letter from the company explaining what expenses are reimbursed. This should include a statement as to whether or not the reimbursement plan is "accountable" or "non-accountable."
- A statement as to whether or not reimbursement is included in your W-2, and, if so, where on the W-2 the reimbursement is reported.
- A copy of any lodging expenses claimed.
- Copies of logs, diaries or other records showing all expenses incurred, job locations and dates you were at each location. For meals and entertainment, these records should detail the business purpose and business relationship. This includes requests for reimbursement for employees on accountable plans.
- Verification of total mileage on the Vehicle(s). This can be from two repair receipts, inspection slips or any other records showing mileage for the year.
- If vehicle expenses were claimed, provide receipts, invoices and cancelled checks for your automobile expenses. These would include gas, oil, tires, repairs, insurance, interest, tags, taxes, parking fees and tolls.