

Business Vehicle & Equipment

Use when a client uses a vehicle for work or buys/sells business assets.

Client name:

Tax year:

01 | Asset identification

For each vehicle or asset: make/model/type, model year, owner, and business using it. Do not enter VINs or account numbers here.

02 | Acquisition and first use

Purchase date, cost including relevant costs, new/used status, seller relationship, and date first available for business use.

03 | Prior ownership and personal use

Was it owned personally before business use? Give original purchase details, first business-use date, and value information available at conversion.

04 | Business use

Describe business purpose, who uses it, business-use percentage and how established. Any personal use, commuting, or use in another business?

05 | Vehicle mileage

Beginning/ending odometer, total annual miles, business miles, commuting miles, other personal miles, and dates in service. Provide your mileage log.

06 | Mileage records

How and when were records kept? Do they show dates, destinations, purpose, and miles? What is missing? Do not reconstruct amounts without a supported basis.

Answer every item. Write None or Not sure when needed. Add a page for extra people/assets.

Save and reopen to check answers. Return only through your own preparer's secure portal.

This questionnaire is not an e-file authorization, tax election, or determination of eligibility.

Business Vehicle & Equipment

Use when a client uses a vehicle for work or buys/sells business assets.

Client name:

Tax year:

07 | Vehicle operating costs

Give fuel, insurance, repairs, tires, registration, interest, lease payments, parking/tolls, reimbursements, and business-use allocation records.

08 | Prior tax treatment

Previously used mileage or actual expenses? Any depreciation, Section 179, bonus depreciation, or lease inclusion? Provide prior returns and depreciation schedules.

09 | Vehicle specifications

For trucks/SUVs/vans, provide manufacturer weight-rating and configuration records when relevant. The preparer will review any limits.

10 | Asset sale or trade

Sold, traded, gifted, converted to personal use, or stopped using an asset? Give date, proceeds, trade documents, and changes in business use.

11 | Equipment and improvements

Describe non-vehicle assets, improvements, installation costs, financing, rebates, and records of purchase and business use.

12 | Documents and questions

Upload purchase/finance documents, logs, receipts, and prior depreciation securely. Describe missing information. No deduction method is elected by this form.

Answer every item. Write None or Not sure when needed. Add a page for extra people/assets.

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