



Dear client(s),

Once again tax season is here. As the year, has gone by Haven Truck & Fleet Accounting hopes that the year was good to you and yours. Once again, Haven Truck & Fleet Accounting is here to provide top notch services to our clients and help with all their tax, accounting, benefits and so much more needs and wants. We just want to thank you all again for choosing Haven Truck & Fleet Accounting as your service provider.

We do thank you for taking time out to fill out and sign our tax packet so that we can best suit your needs. Please if you have any questions call us right away, do not wait until the end of tax season to ask important questions that may affect the outcome of your taxes. Once this is completed you can submit the tax packet and any information you need to send to us by one of the following ways:

- Fax: 866-679-0064
- Email: info@haventruck.com
- Mail: PO Box 431, Wausau, WI. 54402
- Physical address: 1803 Stewart Ave Ste. A, Wausau, WI. 54401

Also, feel free to contact us about benefit packages. Yes, that's right benefits. We can offer specialized benefits to those in the transportation industry. Don't hesitate and schedule your appointment time now to see what benefits we can help you get and how they can help improve your life!

We look forward to many years servicing you and yours.

An authorized IRS E-File Provider



1803 Stewart Ave Ste. A
PO Box 431
Wausau, WI. 54402
P)715-524-1333 Ext. 101
F) 866-679-0064



1040 Tax Return

Tax Payer	
Name	
Email address	
Work number	
Cell number	
Fax Number	

Spouse	
Name	
Email address	
Work number	
Cell number	
Fax Number	

Exemptions	
Yourself	
Spouse	
Filing Status	
Single	
Married filling joint	
Married filing separately	
Head of household	
Qualifying widow(er) with dependent child	

Dependent Name	Dependents Social Security Number	Dependents Relationship to you	Dependents Date of Birth

Note: You may claim as many dependents as you like, but for "earned income credit" three children are the max for federal purposes.



Income Section (Please check all areas that apply to your situation and submit all supporting documents when you submit this form back to us.)	
Wages, salaries, W-2 income	
Taxable interest	
Tax-exempt interest	
Ordinary dividends	
Qualified dividends	
Taxable refunds, credits, or offsets of state and local income taxes	
Alimony received	
Self-employed (Business owner/Farmer)	
Capital gains/losses?	
Other gains/losses?	
IRA Distributions'	
Pension and annuities	
Rental real estate, royalties, partnerships, S-corps, trusts, etc.	
Farm income/loss?	
Unemployment	
Social security income	
Other income? (Gambling W-2G, any income not reported on Sch-C/Sch-F)	

Income Section (Please check all areas that apply to your situation and submit all supporting documents when you submit this form back to us.)	
Educator expense	
HAS deductions	
Moving expenses	
Self-employed SEP, SIMPLE, and qualified plans	
Self-employed health insurance	
Early withdrawal savings penalty	
Alimony paid	Recipients SSN

Home owner section (Please check all areas that apply to your situation and submit all supporting documents when you submit this form back to us.)	
First-time homebuyer credit repayment	
Property tax	

Health care (Please check all areas that apply to your situation and submit all supporting documents when you submit this form back to us.)	
Did every in the house hold have health care coverage	Yes <input type="checkbox"/> No <input type="checkbox"/>
If "yes", and the insurance was provided by the "market place", please included form 1095A	

This is for anyone filing a Sch-C or Sch-F:
If unsure if you are required to fill this area out, please contact a member of our staff:



Income and Common Items:

Please only include information if it pertains to this company:

Gross receipts or sales	
Returns and allowances	
Other Income	
Interest income on receivables	
Recoveries of bad debts deducted in earlier years	

Cost of Goods Sold:

Not all companies will use or are required to use the "Cost of Goods Sold" method. If you are unsure if your company should or has been using this method. Please contact us before you complete this section.

Please only state dollar amounts in the space available below:

Inventory at beginning of year	
Purchase less cost of items withdrawn for personal use	
Cost of labor	
Additional section 263A costs	
Other cost	
Inventory at the end of year	

Methods used for valuing inventory:

There are two different ways of valuing your inventory FIFO "First in First Out" (Which is the most common way and LIFO "Last in First Out". If you are unsure if this pertains to your company or if you should be using and of the following information, please contact us.

Please only mark one sections A, and only mark sections B, C & D if they pertain to your company

A) Cost	<input type="checkbox"/>	Lower of cost or market	<input type="checkbox"/>	Other	<input type="checkbox"/>
B) Write down of subnormal goods	<input type="checkbox"/>				
C) LIFO (Last in first out) was adopted this tax year	<input type="checkbox"/>				
D) If LIFO was used, Enter amount of closing at end of year	<input type="text"/>				
E) Do the rules of section 263A apply to this partnership?					
	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	
F) Was there any change in determining inventories'?					
	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	
If yes, please explain:					



Business Expenses:

All entries must be in a numerical form:

Advertising		Pensions/Profit Sharing	
Commissions and fees		Rent-Vehicle, machine	
Contract labor		Rent-Other	
Depletion		Repairs/Maintenance	
Employee Benefits		Supplies	
Insurance		Taxes and Licenses (2290's, IFTA-HUT, Etc.)	
Interest-Mortgage		Travel	
Interest-Other		Meals and Entertainment	
Legal and professional services		Utilities	
Office Expenses		Wages	
Per Diem (Solo Driver)		Postage/shipping	
Per Diem (Team Driver)		Other	
Communication		Other	
Parking fees and tolls		Other	
Permits and fees		Reefer gallons purchased (this is gallons only)	

If you or the company processed payroll for employee's, please include total amounts below:	
Payroll	
Federal and state tax withheld	
Workers comp and unemployment	
Employee benefits paid by employer?	

Health Care Coverage cost:

Business Use of a home:

Total square feet of your home	
Total amount of square feet used for business	



Please List interest on all open loans here:

This DOES NOT INCLUDE any asset listed on the depreciation schedule:

Interest	
Interest	
Interest	
Interest	
Interest	
Interest	
Total	

Please list all insurance here, totals are fine:

Insurance (Enter total if not using detail below)	
Building and equipment	
Liability	
Other insurance	
Workers' compensation	

Taxes and Licenses:

City income taxes	
City franchise tax	
Local property taxes	
Intangible property taxes	
Payroll taxes (state and federal total please)	
Foreign taxes paid	
IFTA-HUT taxes	
Other Miscellaneous taxes	
Licenses	



Vehicle for mileage:

Description of vehicle				
Date placed in service				
Another vehicle available for personal use?	Yes		No	
Vehicle available for use during off-duty?	Yes		No	
Evidence to support this decision?	Yes		No	
If "Yes", is the evidence in writing?	Yes		No	
<u>Current year mileage</u>				
Business				
Commuting				
Other				
<u>Expenses</u>				
Gas/Fuel				
Insurance				
Maintenance				
Registration				
Misc. Fees (parking and such)				

Installment Sale Income:

Final year of instalment sale	Yes		No	
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Description of property				
Date acquired				
Date sold				
Was the property sold to a related party after 5-14-1980?	Yes		No	
If "Yes" to line3, was the property a marketable security?				
			Current Years	Prior Years
Selling Price or % Rate		Interest		
Mortgages assumed		Principle		
Cost of property sold		Force total gain		
Depreciation allowed		Forced ordinary		
Commissions & Exp. of sale		Force capital gain		
Depreciation to recapture				



Related party Sale Income:

ID Number		Is this number an EIN	Yes		No	
Name						
Address						
City						
State, Zip						
Did the related party dispose of the asset during the year?		Yes		No		
If Yes, was the second disposition more than two years after the first disposition?						
Date						
Was the first disposition a sale of stock to the issuing company						
Did the second disposition occur after the death of the original seller or purchaser?						
Can the IRS be convinced of NO Tax Avoidance purpose?						
If Yes, explain:						
Selling price of property sold by related party						

If Installment income happened to said company more than once during the tax year, please complete print and complete another form.

Capital Gain and Losses:

Totals for all short-term transaction reported on form 1099-B for which basis was reported to the IRS, in which you have no adjustments	Proceeds (sales price)	Cost (Or other)
Totals for all long-term transaction reported on form 1099-B for which basis was reported to the IRS, in which you have no adjustments	Proceeds (sales price)	Cost (Or other)
	Gain or Loss	28%
Capital gain distributions - long-term		



Sales and Other Dispositions of Capital Assets:

Property type						
State						
Basis reported to the IRS						
Basis not reported to the IRS						
Transaction not reported on form 1099-B						
Description of property						
Date acquired		Date Sold/Disposed		Type of gain/loss	Short-term	
					Long-term	
Federal Tax withheld						
State name						
State ID number						
State tax withheld						

If more than one Sale or Disposition of Capital Asset transpired; please complete this form.

Other information: Please include any other information that is important for tax filing purposes below:

Haven

"Keeping you Rolling!"

TRUCK & FLEET ACCOUNTING

Dear client(s),

Once again Haven Truck & Fleet Accounting would like to thank you for your business. As a token of our appreciation, please do not forget we offer referrals for all new clients you send our way. Once the client has either signed up for annual services or paid for individual services, we will send you the referral fee.

Once again, the methods you can submit the tax packet and the information we need to complete your tax return(s), is listed below. Lastly, please contact us if you have any questions.

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Anthony E Havelka-Chibici

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Founder Partner and Co-Owner
Haven Truck & Fleet Accounting

Bill Stadler

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