

## Horse Owners, Drivers & Trainers Tax Preparation Expense Summary

**Tax Year:** \_\_\_\_\_

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### Client Information

**Stable / Farm Name (if applicable):** \_\_\_\_\_

**Owner / Trainer Name:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Phone:** \_\_\_\_\_ **Email:** \_\_\_\_\_

**Business Structure:**

- Sole Proprietor
- Partnership
- LLC
- S Corporation
- C Corporation

**EIN (if applicable):** \_\_\_\_\_

**Primary Activity:**

- Horse Training
  - Horse Breeding
  - Racing
  - Driving / Harness Racing
  - Boarding Stable
  - Riding Instruction
  - Competition / Showing
  - Mixed Equine Business
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### Income

**Horse Sales:** \$ \_\_\_\_\_

**Prize Money / Winnings:** \$ \_\_\_\_\_

**Training Fees:** \$ \_\_\_\_\_

**Boarding Income:** \$ \_\_\_\_\_

**Lessons / Clinics:** \$ \_\_\_\_\_

**Breeding Income (Stud Fees / Foals):** \$ \_\_\_\_\_

**Sponsorships / Endorsements:** \$ \_\_\_\_\_

**Other Equine Income:** \$ \_\_\_\_\_

Please attach:

- 1099 forms
- Prize money statements
- Sales contracts
- Stable income records
- Competition records

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## Horse Care & Maintenance

Feed / Hay / Grain: \$ \_\_\_\_\_

Supplements / Vitamins: \$ \_\_\_\_\_

Veterinary Care: \$ \_\_\_\_\_

Farrier Services (Shoeing/Trimming): \$ \_\_\_\_\_

Deworming / Medications: \$ \_\_\_\_\_

Grooming Supplies: \$ \_\_\_\_\_

Bedding (straw, shavings, etc.): \$ \_\_\_\_\_

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## Boarding & Facility Expenses

Stable / Barn Rent: \$ \_\_\_\_\_

Pasture Lease: \$ \_\_\_\_\_

Arena Maintenance: \$ \_\_\_\_\_

Ring Footing / Sand / Materials: \$ \_\_\_\_\_

Manure Removal: \$ \_\_\_\_\_

Fencing & Repairs: \$ \_\_\_\_\_

Water / Electricity for Barn: \$ \_\_\_\_\_

Equipment for Stables: \$ \_\_\_\_\_

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## Training & Instruction

Trainer Fees Paid: \$ \_\_\_\_\_

Assistant Trainers / Grooms: \$ \_\_\_\_\_

Riding Lessons: \$ \_\_\_\_\_

Clinics / Seminars: \$ \_\_\_\_\_

Performance Coaching: \$ \_\_\_\_\_

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## Transport & Travel

Horse Trailer Expenses: \$ \_\_\_\_\_

Truck Expenses (if used for horses): \$ \_\_\_\_\_

Fuel (Equine Transport): \$ \_\_\_\_\_

Repairs & Maintenance: \$ \_\_\_\_\_

Insurance (Truck/Trailer): \$ \_\_\_\_\_

Tolls & Parking: \$ \_\_\_\_\_

Commercial Hauling Fees: \$ \_\_\_\_\_

Airfare (Competitions): \$ \_\_\_\_\_

Hotels / Lodging: \$ \_\_\_\_\_

Meals While Traveling: \$ \_\_\_\_\_

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## Competition & Event Costs

Entry Fees: \$ \_\_\_\_\_

Stall Fees: \$ \_\_\_\_\_

Registration Fees: \$ \_\_\_\_\_

Association Memberships: \$ \_\_\_\_\_

Show Attire / Equipment: \$ \_\_\_\_\_

Grooming for Shows: \$ \_\_\_\_\_

Event Insurance: \$ \_\_\_\_\_

Photography / Videography: \$ \_\_\_\_\_

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## Breeding Operations (if applicable)

Stud Fees Paid: \$ \_\_\_\_\_

Artificial Insemination Fees: \$ \_\_\_\_\_

Foaling Expenses: \$ \_\_\_\_\_

Veterinary Reproduction Services: \$ \_\_\_\_\_

Registration / Bloodline Papers: \$ \_\_\_\_\_

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## Equipment & Tack

Saddles / Harnesses: \$ \_\_\_\_\_

Bridles / Reins / Tack: \$ \_\_\_\_\_

Horse Blankets & Gear: \$ \_\_\_\_\_

Training Equipment: \$ \_\_\_\_\_

Repairs of Tack: \$ \_\_\_\_\_

Small Tools & Supplies: \$ \_\_\_\_\_

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## Labor & Contract Services

Stable Hands / Grooms: \$ \_\_\_\_\_

Barn Staff Wages: \$ \_\_\_\_\_

Contract Trainers: \$ \_\_\_\_\_

Veterinary Technicians: \$ \_\_\_\_\_

Farrier Assistance: \$ \_\_\_\_\_

Payroll Taxes: \$ \_\_\_\_\_

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## Insurance

Mortality Insurance (Horse Coverage): \$ \_\_\_\_\_

Liability Insurance: \$ \_\_\_\_\_

Equine Insurance Policies: \$ \_\_\_\_\_

Property Insurance (Barn/Stable): \$ \_\_\_\_\_

Trailer Insurance: \$ \_\_\_\_\_

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## Marketing & Business Development

Website & Advertising: \$ \_\_\_\_\_

Social Media Promotion: \$ \_\_\_\_\_

Sponsorship Marketing: \$ \_\_\_\_\_

Horse Sale Commissions: \$ \_\_\_\_\_

Promotional Materials: \$ \_\_\_\_\_

Client Acquisition Costs: \$ \_\_\_\_\_

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## Administrative & Office Expenses

Office Supplies: \$ \_\_\_\_\_

Accounting & Bookkeeping: \$ \_\_\_\_\_

Software / Stable Management Systems: \$ \_\_\_\_\_

Phone / Internet (Business Portion): \$ \_\_\_\_\_

Legal & Professional Fees: \$ \_\_\_\_\_

Licensing / Registration Fees: \$ \_\_\_\_\_

Association Dues: \$ \_\_\_\_\_

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## Assets Purchased During the Year

Please list major purchases (horses, trailers, equipment, etc.)

**Description Date Purchased Cost**

Examples:

- Horses (purchase price)
  - Horse trailers
  - Trucks used for transport
  - Barn equipment
  - Arena machinery
  - Breeding stock
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## Land & Facility Costs

Farm or Stable Mortgage Interest: \$ \_\_\_\_\_

Property Taxes: \$ \_\_\_\_\_

Land Lease Payments: \$ \_\_\_\_\_

Facility Improvements: \$ \_\_\_\_\_

Irrigation / Water Systems: \$ \_\_\_\_\_

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## Retirement Contributions

SEP IRA: \$ \_\_\_\_\_

Solo 401(k): \$ \_\_\_\_\_

Traditional IRA: \$ \_\_\_\_\_

Roth IRA: \$ \_\_\_\_\_

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## Estimated Tax Payments

Federal Estimated Taxes: \$ \_\_\_\_\_

State Estimated Taxes: \$ \_\_\_\_\_

Dates Paid: \_\_\_\_\_

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## Other Expenses

Please list any additional equine-related expenses:

Description	Amount
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	\$ _____
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**Description    Amount**

\$ \_\_\_\_\_

\$ \_\_\_\_\_

\$ \_\_\_\_\_

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## Questions

Did you buy or sell any horses this year?

Yes  No

Did you compete in shows or races?

Yes  No

Did you receive prize winnings or sponsorships?

Yes  No

Did you operate a breeding program?

Yes  No

Did you hire employees or contract labor?

Yes  No

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## Additional Notes

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## Client Certification

I certify that the information provided is complete and accurate to the best of my knowledge. I understand that supporting documentation may be required.

**Client Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_