

Personal Training & Athletic Coach Tax Preparation Expense Summary

Tax Year: _____

Client Information

Coach / Business Name: _____

Owner Name: _____

Phone: _____ **Email:** _____

Address: _____

Business Structure:

- Sole Proprietor
- LLC
- S Corporation
- Other: _____

Primary Coaching Area:

- Personal Training
 - Team Sports Coaching
 - Strength & Conditioning
 - Youth Sports Coaching
 - Private Lessons
 - Online Coaching
 - Other: _____
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Income

Coaching / Training Income: \$ _____

Team Coaching Salary or Stipend: \$ _____

Online Coaching / Virtual Programs: \$ _____

Clinic / Camp Income: \$ _____

Sponsorships / Endorsements: \$ _____

Other Athletic Income: \$ _____

Please attach:

- 1099-NEC / W-2 forms
- Client payment summaries
- Gym payout statements
- Online coaching platform reports

Training Equipment & Supplies

Weights / Resistance Equipment: \$ _____

Training Bands / Accessories: \$ _____

Cones / Agility Equipment: \$ _____

Balls / Sport-Specific Equipment: \$ _____

Stopwatches / Timing Devices: \$ _____

Protective Gear / Safety Equipment: \$ _____

Training Uniforms / Apparel: \$ _____

Facility & Rental Expenses

Gym Rental Fees: \$ _____

Field / Court Rental: \$ _____

Training Facility Membership: \$ _____

Storage for Equipment: \$ _____

Facility Maintenance Contributions: \$ _____

Travel & Transportation

Mileage (Coaching Travel): _____ Miles

Fuel: \$ _____

Vehicle Repairs & Maintenance: \$ _____

Parking Fees: \$ _____

Tolls: \$ _____

Airfare (Camps / Events): \$ _____

Hotel / Lodging: \$ _____

Meals While Traveling: \$ _____

Coaching Business Expenses

Marketing / Advertising: \$ _____

Website / Online Coaching Platform: \$ _____

Social Media Promotion: \$ _____

Email / Client Management Software: \$ _____

Scheduling Apps: \$ _____

Payment Processing Fees: \$ _____

Education & Certifications

Coaching Certifications (NASM, ACE, etc.): \$ _____

Continuing Education Courses: \$ _____

Workshops / Clinics: \$ _____

Sports Science / Training Seminars: \$ _____

Books / Training Materials: \$ _____

Communication & Technology

Cell Phone (Business Portion): \$ _____

Internet / Data Plan: \$ _____

Laptop / Tablet: \$ _____

Coaching Apps / Software: \$ _____

Video Analysis Tools: \$ _____

Apparel & Branding

Coaching Uniforms / Branded Clothing: \$ _____

Team Apparel (if self-funded): \$ _____

Custom Gear / Merchandise: \$ _____

Insurance

General Liability Insurance: \$ _____

Professional Liability Insurance: \$ _____

Health / Injury Insurance (Self-Employed Portion): \$ _____

Equipment Insurance: \$ _____

Staff & Contract Labor

Assistant Coaches: \$ _____

Personal Trainers / Subcontractors: \$ _____

Camp Staff / Event Helpers: \$ _____

Payroll Taxes: \$ _____

Professional & Administrative Expenses

Accounting / Bookkeeping: \$ _____

Legal Fees: \$ _____

Business Licenses / Certifications: \$ _____

Bank Fees: \$ _____

Credit Card Processing Fees: \$ _____

Assets Purchased During the Year

List major purchases (equipment, technology, etc.)

Description Date Purchased Cost

Examples:

- Gym equipment
 - Coaching technology (video systems, tablets)
 - Training facility upgrades
 - High-value athletic gear
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Home Office (If Applicable)

Used for program design, client management, or online coaching:

Yes No

Home Square Footage: _____

Office Square Footage: _____

Rent / Mortgage Interest: \$ _____

Utilities: \$ _____

Internet: \$ _____

Repairs (Entire Home): \$ _____

Estimated Tax Payments

Federal Estimated Taxes: \$ _____

State Estimated Taxes: \$ _____

Dates Paid: _____

Client Activity Questions

Did you coach multiple teams or clients this year?

Yes No

Did you travel frequently for events or competitions?

Yes No

Did you receive sponsorships or brand deals?

Yes No

Did you purchase major training equipment?

Yes No

Did you hire assistant coaches or contractors?

Yes No

Other Expenses

Please list any additional coaching-related expenses:

Description Amount

\$ _____

\$ _____

\$ _____

\$ _____

Additional Notes

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: _____