

EXAMPLE FLIGHT INFORMATION PROVIDED BY CLIENT

TODAY



MakeltDeductible

Please provide a one time description of your business to help with context for business flights.

8:39 pm

MakeltDeductible helps clients contemporaneously document important tax events such as Active Participation for Heavy Equipment and Real Estate; or Business Use for Private Airplane Travel.

8:39 pm ✓



MakeltDeductible

For business flights please provide flight/leg details. Include miles, flight hours, personal passengers, and personal use percentage and comments.

Also include screenshots of agendas, emails, expense receipts, logs, passengers, etc.

For personal flights, business use details are not required.

8:41 pm

We flew from Los Angeles, CA to Scottsdale, AZ on 21st January. Our flight time was 2 hrs each way and 750 miles round trip, two legs with the same attributes, i.e. our route was LAX to Scottsdale and back.

We needed to return the same day for a meeting in LAX and this schedule was not an option on a commercial airline.

The business purpose of our flight was to meet with and explain our contemporaneous tax documentation service to a Aviation Tax CPA firm. This CPA firm has told us that the lack of contemporaneous documentation is the single largest risk that their clients face. Our text based service solves this problem. Accordingly, this was primarily a business flight (see agenda attached).

8:43 pm ✓

The passengers included Kevin Matthew, MakeltDeductible General Manager who came on the trip for a personal non-entertainment matter, a different business meeting, (FYI we will do an SIFL calc and W2 allocation to Kevin). My spouse also came along to enjoy some personal entertainment (Scottsdale Shopping). Since my spouse was one of 3 passengers traveling and solely for entertainment, I considered 33% of the flight to be disallowed use based on entertainment passenger seat count.

8:43 pm ✓



I have included pictures of a few items to support this business flight including the agenda for the meeting, emails with the CPA firm, fuel receipts, and a copy of the flight log.

8:50 pm ✓



Type a message



EXAMPLE COVER LETTER

MakeltDeductible.ai

Email:

Phone:

Dear [Client Name],

Enclosed, please find the draft report documenting your recent business flight related to [Client Name]. This report has been compiled based on the information you provided and serves as an initial draft for your review and approval.

Before proceeding, please take note of the following important disclaimers:

1. **Draft Status** – This is a draft report created solely using the details you provided. It is not finalized until reviewed and approved by you.
2. **Review Required** – It is essential that you carefully review the contents to ensure accuracy. If any discrepancies or missing details are found, please make the necessary revisions. Once reviewed, please sign the last section of the report to confirm its accuracy.

3. **Legal Disclaimer** –

*The documentation provided in this report is prepared by MakeltDeductible as part of our documentation service. Our role is limited to organizing and compiling the information provided by the client. **MakeltDeductible does not provide tax, legal, or financial advice.***

*The accuracy, completeness, and validity of the contents in this report are the sole responsibility of the client. **It is the client's responsibility to review, approve, and sign off on the documentation** to ensure compliance with applicable laws and regulations, including but not limited to state and federal tax requirements.*

By signing this document, the client acknowledges that they have reviewed the contents and accept full responsibility for the information submitted. MakeltDeductible is not liable for any errors, omissions, or misrepresentations within the documentation provided.

If you have any questions or need modifications to the report, please do not hesitate to reach out. Once finalized and signed, this report will serve as formal documentation of your business activities.

EXAMPLE TAX DOCUMENTATION

Field	Details
Primary Business Purpose of Flight	Meeting with Aviation Tax CPA firm to discuss MakeltDeductible.ai's contemporaneous tax documentation service.
Flight No.	001
Flight Legs	2
Date	21-Jan-2025
Origin	Los Angeles, CA (LAX)
Destination	Scottsdale, AZ (SDL)
Aircraft Details	[Not Provided]
Total Flight Time - Hours	4 (2 hours each way)
Total Flight Miles	750
Seats (Passenger count)	3
Business Passengers (B)	1 (Aaron deSouza)
Business Entertainment Passengers (BE)	0
Personal Non-Entertainment Passengers (PNE)	1 (Kevin Mathew)
Personal Entertainment Passengers (PE)	1 (Spouse)
Training Passengers (T)	0
Maintenance Passengers (M)	0
Expenses Provided	\$10,000
Nature of Expenses	Fuel
Deadhead Legs	0
SIFL Amount for Non-Business Passengers	[Not Provided]
Reimbursed Amount	[Not Provided]

BUSINESS DESCRIPTION

Company Name: MakeltDeductible.ai

Taxpayer Identification Number (Tax ID): [Not Provided]

Business Description:

MakeltDeductible.ai provides clients with contemporaneous documentation of important tax events, including Active Participation for Heavy Equipment and Real Estate, as well as Business Use for Private Airplane Travel. The company's text-based service aims to mitigate IRS audit risks by ensuring clients maintain appropriate documentation in real time.

EVENT DETAILS

A. Flight Details

- **Flight Number:** 001
- **Flight Date:** 21-Jan-2025
- **Flight Legs:** 2
- **Aircraft:** [Not Provided]
- **Total Flight Time:** 4 hours
- **Total Flight Miles:** 750 miles

B. Passenger Details

- **Business Seats:**
 - Aaron deSouza (Founder, MakeltDeductible.ai)
- **Business Entertainment Seats:**
 - [Not provided]
- **Personal Non-Entertainment Seats:**
 - Kevin Matthew (General Manager, MakeltDeductible.ai)
- **Personal Entertainment Seats:**
 - [Spouse's Name] (Personal entertainment - shopping in Scottsdale, AZ)

C. Expense Summary

- **Fuel:** \$10,000 (2000 gallons Jet A fuel)

D. Event Itinerary

- **Purpose:** Presenting MakeltDeductible.ai's tax documentation solution to an Aviation Tax CPA firm.
- **Agenda:**
 - Introduction to MakeltDeductible.ai's documentation services.
 - Discussion on how lack of contemporaneous documentation impacts tax audits.
 - Demonstration of the company's text-based documentation solution.
 - Collaboration opportunities with the CPA firm.
- **Reason for Same-Day Travel:**

- A return meeting in Los Angeles was scheduled the same day, necessitating a tight travel itinerary.
 - No commercial flights were available to support this schedule.
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TAX JUSTIFICATION

A. Business Purpose

- The meeting was critical for establishing a working relationship with the CPA firm, which specializes in aviation tax planning.
- Their clientele represents a key target market for MakeltDeductible.ai's services, making this engagement essential for business growth.

B. Financial and Operational Impact

- **Connection to Business Objectives:**
The meeting was critical for establishing a working relationship with the CPA firm, which specializes in aviation tax planning. Their clientele represents a key target market for MakeltDeductible.ai's services, making this engagement essential for business growth.
- **Anticipated Financial Benefits:**
 - Potential for CPA firm to refer clients to MakeltDeductible.ai.
 - Increased revenue from expanded customer base.

C. Necessity of Each Passenger

- **Aaron deSouza (Founder):** Leading business discussions, pitching MakeltDeductible.ai's solution.
- **Kevin Matthew (General Manager):** Unrelated business meeting, hence classified as Personal non-entertainment.
- **[Spouse's Name] (Personal Entertainment Seat):** Accompanied for personal entertainment reasons.

D. Reasonableness of Use of Private Aircraft

- **Commercial flights were infeasible** due to:
 - No commercial flights supporting the same-day round-trip itinerary.
 - Tight scheduling requiring private travel flexibility.
 - Need for direct, efficient business travel to maximize productivity.

- Fuel receipt (attached)



- Passengers



REAL-TIME TAX CERTIFICATION

I certify that the activities and expenses documented above reflect my active participation in the business and align with MakeltDeductible.ai's operational and financial goals. This documentation meets IRS requirements for substantiating the business deduction for private plane use.

Approved by: Aaron deSouza
Company: MakeltDeductible.ai
Date: 07-February-2025