Aug. 30, 1960 O. A. ZAHNER 2,950,855

EXPENSE RECORD PACKET AND METHOD OF MAKING

Filed July 3, 1958 2 Sheets-Sheet 1

Fig. 1.

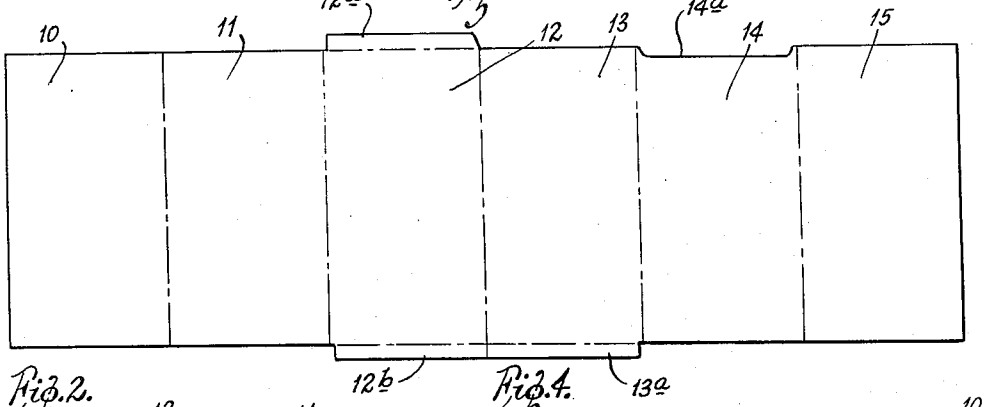



Fig. 2.

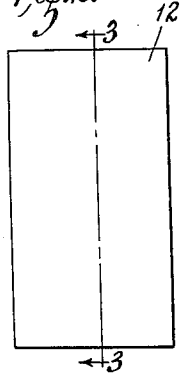



Fig. 3.

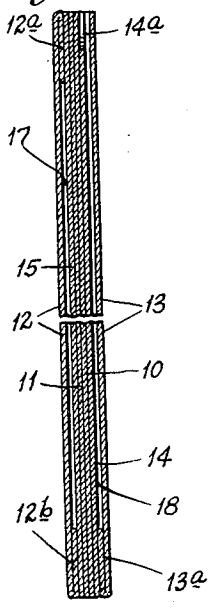



Fig. 4.

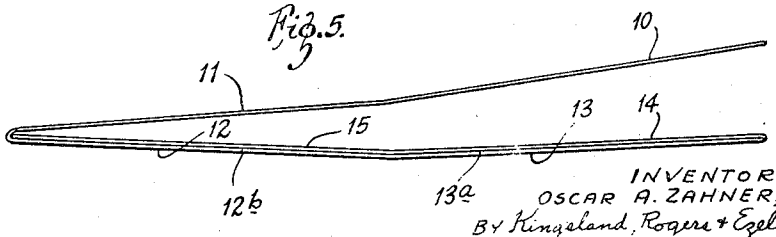
| WEEK OF | SUN | MON | TUE | WED | THU | FRI | SAT |
|---|---|---|---|---|---|---|---|
| TOWNS COVERED | | | | | | | |
| LODGING | | | | | | | |
| TRAIN-BUS-PLANE | | | | | | | |
| MEALS: BREAKFAST | | | | | | | |
| MEALS: LUNCH | | | | | | | |
| MEALS: DINNER | | | | | | | |
| MEALS: EXTRA | | | | | | | |
| ENTERTAINMENT | | | | | | | |
| TAXI-CAR FARE-BUS | | | | | | | |
| TIPS-INCIDENTALS | | | | | | | |
| AUTO EXPENSE: MILEAGE | | | | | | | |
| AUTO EXPENSE: GAS | | | | | | | |
| AUTO EXPENSE: OIL | | | | | | | |
| AUTO EXPENSE: PARK-STO. | | | | | | | |
| AUTO EXPENSE: LUB-WASH | | | | | | | |
| AUTO EXPENSE: REPAIRS | | | | | | | |
| TELEPHONE-WIRE-MAIL | | | | | | | |
| ODD ITEMS | | | | | | | |
| TOTAL | $ | $ | $ | $ | $ | $ | $ |
| TAXES PD. | $ | $ | $ | $ | $ | $ | $ |

STARTED WITH $_____
RET. WITH $_____
CHARGED $_____

SECURE RECEIPTS WHENEVER POSSIBLE
RECORD EXPLANATIONS INSIDE ON UNUSUAL ITEMS BY PUTTING ① ② etc. BEHIND AMOUNTS ABOVE

TOTAL $_____
REIMBURSED $_____

Fig. 5.




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Fig. 6.

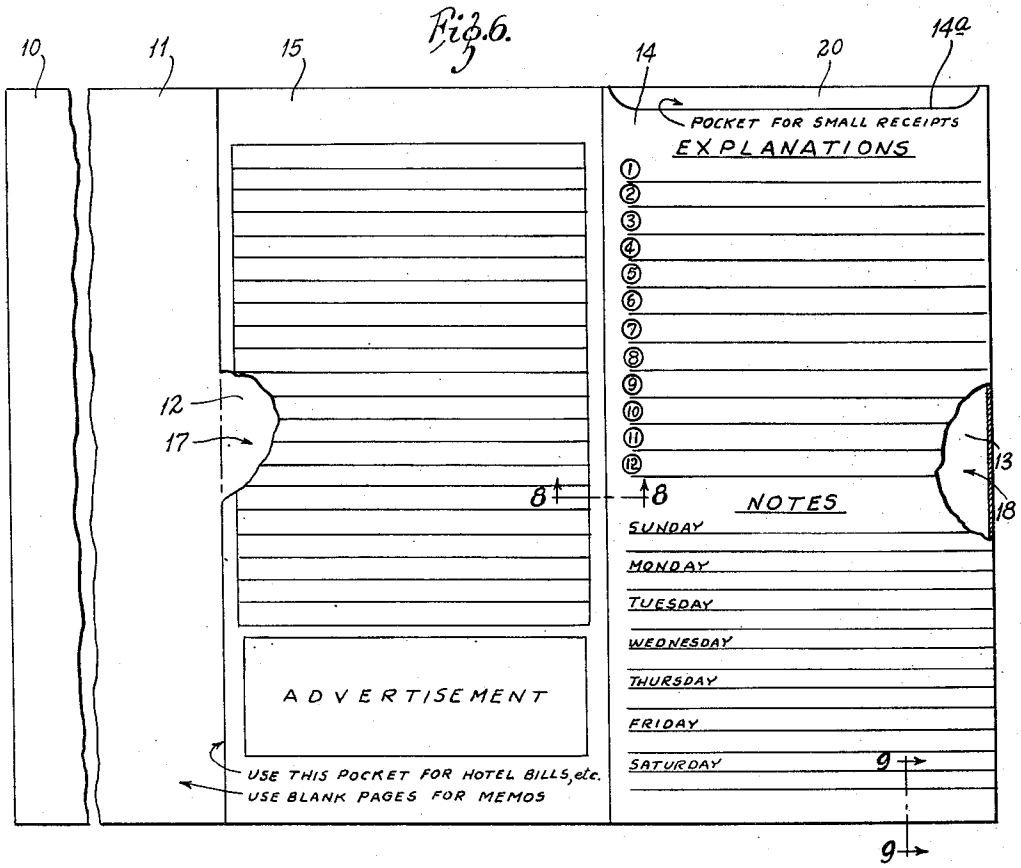



Fig. 7.

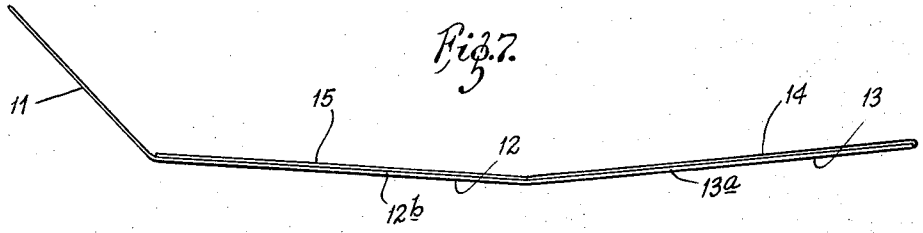



Fig. 8.

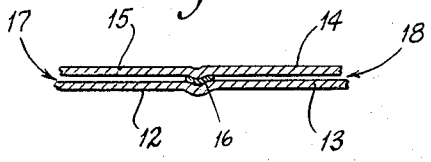
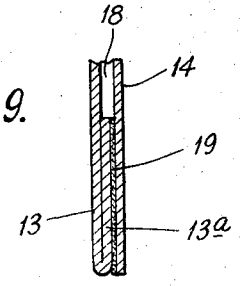



Fig. 9.




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# EXPENSE RECORD PACKET AND METHOD OF MAKING

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Filed July 3, 1958, Ser. No. 746,540

2 Claims. (Cl. 229—72)

This invention relates to an expense record packet, and the method of making the same.

In view of the necessity of keeping accurate provable expense records for the justification of deductions on tax reports, the utility of a device for currently recording and preserving in one packet applicable vouchers and receipts is obvious.

A packet for this purpose should be simply arranged to avoid complicated methods of preserving the recorded data, and separating and maintaining the vouchers applicable to such data.

For use in making and preserving expense accounts, especially for individuals making expenditudes in traveling, such records should be designed in such manner as to serve as an indication or reminder to the user to record all necessary and complete data for a selected time period, for example, for a weekly expense account, and to provide in connection therewith a file for keeping the necessary papers in support of the recorded data in such a manner as to provide a file of these papers as the evidence in support of the recorded items.

It is also desirable that such a device be designed so that it may be cut from a single blank and folded to provide the necessary blanks for the pertinent printed portion of the record to receive the currently recorded data and to provide compartments or file pockets to receive and maintain the necessary vouchers applicable to the recorded data.

It is the purpose of the present invention to accomplish the foregoing objectives, and to provide a method whereby such a device may be economically made.

The complete advantages of the invention will more fully appear from the following detailed description of the device and the method employed in its production when taken in connection with the accompanying drawings, in which:

Figure 1 is a view of the pre-cut blank with the fold lines indicated by dotted lines from which the device is constructed;

Figure 2 is a front face view of the device in completed form;

Figure 3 is a vertical transverse section through the device on the line 3—3 of Figure 2;

Figure 4 is a view of the completed packet opened on its central fold line and viewed in plan when in a flat position;

Figure 5 is a bottom edge view of the device as illustrated in Figure 4 with the panels slightly spread apart;

Figure 6 is a plan view of the device opened to more clearly illustrate the interior face of the compartments or pockets and the printed blanks thereon to receive certain of the recorded data;

Figure 7 is a bottom edge view of the device as illustrated in Figure 6;

Figure 8 is an enlarged view on the line 8—8 of Figure 6; and

Figure 9 is an enlarged view on the line 9—9 of Figure 6.



In Figure 1, there is illustrated the blank from which the completed device is constructed, and the dotted lines show where each of the adjacent panels fold. These panels are indicated in sequence, reading from the left of this view, by the numerals **10, 11, 12, 13, 14** and **15**, respectively. It will be noted that the panel **12** has an upper marginal tab **12***a* and a lower marginal tab **12***b*, and that the panel **13** has a lower marginal tab **13***a*. Also the panel **14** has a slight upper marginal cut-out **14***a*.

It is contemplated that each of the panels will be dimensioned approximately 7 by 3.5 inches so that, when folded, the device will be a convenient pocket size.

The method of folding and attachment of the panels to form the completed device will appear from the further disclosure, and also that the several layouts of the printed matter can be made by one impression.

The panel **12** is the cover sheet of the completed article and affords space for such printed data as desired, for example, the name and address of the user and the period covered by the recorded data and associated papers contained in the file pockets.

The adjacent panels **11** and **10** are arranged to be spread laterally from the cover and afford space for the data receiving layout of Figure 4.

It will be noted that printed matter in the left hand column of this form provides side headings indicating the usual travel expense items to serve as a reminder to the user to record in the lateral columns on a weekly breakdown in order to provide a currently recorded original entry of daily expenses. Additional optional headings and space for recording additional data may also be included. This double sheet, therefore, provides an original entry blank for all usual current data for travel expenses and related information and, therefore, for accounting purposes would be the primary record of expenditures.

The panels **14** and **15** fold back of the panels **13** and **12** so that the panel **14** is parallel with the back face of the panel **13**, and the panel **15** with the back face of the panel **12**. The tabs **12***a* and **12***b* are then folded between the upper and lower edges of the panel **12**, respectively, and the union of these edges made by securing together the adjacent edges of these panels at one side by an adhesive **16**. This forms a side opening pocket **17** back of the panel **12**. This pocket is convenient for receiving and filing such papers as hotel bills, tickets, and such other original receipts and vouchers in support of the expense items that are recorded on the original expense account on panels **10** and **11**. The back cover **15** of the pocket **17** may be lined as illustrated at the left of Figure 6, and provides a convenient space for recording miscellaneous memoranda.

A second pocket **18** is formed by interposing the tab **13***a* between the lower adjacent edges of the panels **13** and **14** and outer face of the tab **13***a* secured to the adjacent face of the panel **14** by a layer of adhesive **19** (Figure 9). This arrangement of parts provides a pocket having a top opening, and is adapted to receive and file small papers and memoranda related to certain of the recorded expense items.

The back cover of the pocket **18** may have printed thereon a form, for example, such as that indicated at the right of Figure 6. The upper part of this form provides space for recording sundry explanatory notes with the lines numerically indicated to coordinate the data with items on the original expense account form which may require further explanation. The lower section of the form provides convenient space for recording miscellaneous daily notes, and for this purpose the days of the week are shown as consecutive side headings.

It will be noted from the foregoing description that the panels **10** and **11** may be spread flat for recording data

and then folded back of the panels **12** and **13** and over the open vertical edge of the pocket **17**. In this manner, when the device is in folded adjustment, the opening in this pocket will be covered, preventing the papers contained therein from slipping out when the device is carried in the user's pocket, and the horizontal open edge **20** of the pocket **18** is accessible for inserting papers without unfolding the packet.

From the foregoing description, it will be observed that a device has been disclosed in some detail which provides a complete packet for the recording and filing of appropriate data and vouchers for making an original entry of items and preserving supporting vouchers that can be filed and maintained on a date and time basis to verify at selected time intervals, primarily for reporting and verifying traveling expenses for income tax purposes, and for other related accounting audits.

What is claimed is:

1. A pocket packet of folded material, sized to be carried in a coat pocket, the packet being formed of a single, unitary elongated strip of material, the strip having one end portion folded over a middle portion to constitute a main section in which pockets are disposed; means joining the middle portion and the overlying end portion along a transverse line medial with respect to the main section, the parts being folded along said transverse line to divide the main section into two equal pocket-sized halves; means joining the bottom edges of the overlying portions constituting the main section, and means joining the top edges of one half of said portions, whereby to form, in the main section, a top-opening pocket in one half and a side opening pocket in the other half; and the strip having an integral panel provided with ruled vertical and horizontal lines for the entry of expense items, said panel extending from the end of the main section, the panel being folded back to close the side opening pocket, the panel being of a size substantially the same as one half of the main section.

2. The packet of claim 1, wherein the means joining the top and bottom edges of the main section to make the pockets, comprise integral tabs on the upper and lower edges of the strip at the parts to be joined, the tabs being turned in at the edge of the strip to overlie the facing part of the strip and be joined thereto, and wherein said top opening pocket has a cutout portion at the top to provide easy access to the contents.



UNITED STATES PATENTS

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