



SELF-EMPLOYED WORKSHEET

LEGAL BUSINESS NAME (IF ANY): _____ EIN: _____

ENTITY TYPE: SOLE PROPRIETORSHIP SINGLE MEMBER LLC ACCOUNTING METHOD: CASH ACCRUAL

BUSINESS ADDRESS: _____ CITY: _____ STATE: _____ ZIP: _____

BUSINESS MANAGEMENT

HOW LONG HAVE YOU OWNED YOUR BUSINESS? _____ WHAT DOES YOUR BUSINESS PROVIDE: _____

YES NO DO YOU MAINTAIN SEPARATE BANK ACCOUNTS FOR PERSONAL AND BUSINESS TRANSACTIONS?

YES NO ARE YOU REPORTING ALL OF THE INCOME YOU RECEIVED, INCLUDING CASH PAYMENTS?

YES NO ARE ALL OF YOUR EXPENSES ORDINARY, NECESSARY, AND REASONABLE FOR YOUR BUSINESS?

YES NO DID YOU PAY ANYONE \$600 OR MORE? (IF YES, PROVIDE COPIES OF THE 1099-NEC'S)

YES NO DO YOU HAVE EMPLOYEES? (IF YES, PROVIDE COPIES OF W2'S & PAYROLL TAX RETURNS)

VEHICLE INFORMATION (DRIVING TO AND FROM WORK IS CONSIDERED COMMUTING AND GENERALLY IS NOT DEDUCTIBLE)

YEAR _____ MAKE _____ MODEL _____ DATE PLACED IN SERVICE _____

ANNUAL MILES: TOTAL _____ BUSINESS _____ COMMUTING _____ PERSONAL _____

YES NO WAS THE VEHICLE AVAILABLE FOR PERSONAL USE DURING OFF-DUTY HOURS?

YES NO WAS ANOTHER VEHICLE AVAILABLE FOR PERSONAL USE?

YES NO DO YOU HAVE WRITTEN DOCUMENTATION, SUCH AS A LOGBOOK, TO SUPPORT YOUR MILEAGE AND VEHICLE EXPENSES?

INVENTORY INFORMATION

DID YOU TRACK INVENTORY? YES NO ENDING AMOUNT _____ PURCHASES: _____ PERSONAL USE: _____

SUMMARY OF INCOME AND EXPENSES (IF YOU ARE PROVIDING A P&L OR SPREADSHEET, THIS SECTION IS NOT REQUIRED)

ACCOUNTING	JANITORIAL	BUSINESS TRAVEL
ADVERTISING	LEGAL FEES	BUSINESS MEALS
BANK FEES	LICENSE FEES	PARKING & TOLLS
CONTINUING EDU.	UNIFORMS	TAXES - PROPERTY
CONTRACT LABOR	REPAIRS (NON-AUTO)	TAXES - OTHER
CREDIT PROCESSING	EQUIPMENT RENTAL	UTILITIES
DUES AND SUBS	OFFICE SUPPLIES	TELEPHONE
HEALTH INSURANCE	OTHER SUPPLIES	SMALL TOOLS
INSURANCE (NON-AUTO)	POSTAGE	
INTEREST PAID	PROPERTY RENT	

HOME OFFICE

YES NO IS THERE A DEDICATED SPACE IN YOUR HOME THAT IS USED REGULARLY AND EXCLUSIVELY AS AN OFFICE FOR THIS BUSINESS?

IF YES PROVIDE: SQ. FT OF OFFICE: _____ SQ. FT OF TOTAL HOUSE: _____

FIXED ASSETS

IF YOU PURCHASED OR DISPOSED OF ANY LARGE EQUIPMENT, VEHICLES, OR OTHER ASSETS PLEASE PROVIDE A LIST TO INCLUDE A DESCRIPTION OF THE ITEM, PURCHASE OR DISPOSAL DATE, PURCHASE OR SALES PRICE, AND IF IT ISN'T 100% BUSINESS USE THE PERCENTAGE OF BUSINESS USE.