

# Self-employed Worksheet



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

Principal business or profession, including product or service: \_\_\_\_\_

Business name. If no separate business name, leave blank: \_\_\_\_\_

Business address, if different from primary residence:  
\_\_\_\_\_  
\_\_\_\_\_

## Income

Gross receipts or sales ..... \$ \_\_\_\_\_

Returns and allowances ..... \$ \_\_\_\_\_

Cost of goods sold ..... \$ \_\_\_\_\_

*Below are some example "ordinary and necessary" expenses you can deduct. These deductions can be taken if you are self-employed or receive a Form 1099 listing your earnings, even if you do not itemize deductions.*

## Expenses

Advertising..... \$ \_\_\_\_\_

Commissions and fees ..... \$ \_\_\_\_\_

Contract labor (1099s given to subcontractors) ..... \$ \_\_\_\_\_

Employee benefit programs ..... \$ \_\_\_\_\_

Insurance, other than health ..... \$ \_\_\_\_\_

### Interest

A. Mortgage (paid to banks, etc.) ..... \$ \_\_\_\_\_

B. Other ..... \$ \_\_\_\_\_

Legal and professional services..... \$ \_\_\_\_\_

Office expense ..... \$ \_\_\_\_\_

Pension and profit-sharing plans..... \$ \_\_\_\_\_

### Rent or leases

A. Vehicles, machinery, and equipment ..... \$ \_\_\_\_\_

B. Other business property ..... \$ \_\_\_\_\_

Repairs and maintenance ..... \$ \_\_\_\_\_

Supplies..... \$ \_\_\_\_\_

Taxes and licenses ..... \$ \_\_\_\_\_

Travel ..... \$ \_\_\_\_\_

Business Meals ..... \$ \_\_\_\_\_

Utilities ..... \$ \_\_\_\_\_

Employee Wages ..... \$ \_\_\_\_\_

Other:

Office Telephone ..... \$ \_\_\_\_\_  
Cellphone (business use portion only) ..... \$ \_\_\_\_\_  
Internet ..... \$ \_\_\_\_\_  
Shipping/Postage ..... \$ \_\_\_\_\_  
Uniforms/Cleaning ..... \$ \_\_\_\_\_  
Small Tools & Equipment ..... \$ \_\_\_\_\_  
..... \$ \_\_\_\_\_  
..... \$ \_\_\_\_\_  
..... \$ \_\_\_\_\_  
..... \$ \_\_\_\_\_  
..... \$ \_\_\_\_\_  
..... \$ \_\_\_\_\_  
..... \$ \_\_\_\_\_  
..... \$ \_\_\_\_\_  
..... \$ \_\_\_\_\_

**Car and truck expenses**

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*Vehicle 1:*

Total number of miles you drove your vehicle during the year: \_\_\_\_\_  
Total Business Miles: \_\_\_\_\_

*Vehicle 2:*

Total number of miles you drove your vehicle during the year: \_\_\_\_\_  
Total Business Miles: \_\_\_\_\_

**\*\*If you wish to use actual expense instead of standard mileage, please bring that information at your tax appointment.\*\***

**Home office**

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Enter the total square footage of the home: \_\_\_\_\_  
Enter the total square footage of the part of the home used for business: \_\_\_\_\_

NOTES:

This information is true and accurate to the best of my knowledge. I do have (or I can get) the supporting documentation related to each item I listed above if required by the IRS or state taxing authorities. My tax preparer explained to me and I understand that providing false or misleading information could result in fines, penalties, and/or loss of tax credits.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date