



# Self Employment Worksheet - Tax Year \_\_\_\_\_

BUSINESS OR PROFESSION \_\_\_\_\_ BUSINESS NAME \_\_\_\_\_

BUSINESS ADDRESS, CITY, STATE, ZIP (if any) \_\_\_\_\_

EMPLOYER ID NUMBER (if any) \_\_\_\_\_

Are you the owner of the business?  Yes  No *If yes, use Schedule C.*

Is the business a D.B.A.?  Yes  No *If yes, use Schedule C.*

Is the business a Partnership?  Yes  No *If yes, use Form 1065 K-1*

Is the business an LLC?  Yes  No *If yes, the default filing for a single member LLC is filing Schedule C with the individual return. The default for a multi-member LLC is filing Form 1065 as a partnership unless the entity has applied to be taxed as a different type of entity.*

Is the business a Corporation?  Yes  No *If yes, a corporation will file either Form 1120 or 1120S, depending on the type of corporation.*

Did you use a log book to determine your gross receipts?  Yes  No

If you did NOT use a log book, can you reasonably reconstruct your Gross Receipts?  Yes  No

Did you use a log book to determine your expenses?  Yes  No

If you did NOT use a log book, can you reasonably reconstruct your expenses?  Yes  No

How were you paid (check all that apply)?  Cash  Check  Other

Did you receive a Form 1099-MISC, box 7 income?  Yes  No

Did you receive any other income not reported on Form 1099-MISC?  Yes  No

Did you receive a Form 1099-K for income?  Yes  No

Did you pay anyone to work for you?  Yes  No If yes, how much? \$ \_\_\_\_\_

Did you issue them a Form 1099-MISC or Form W-2?  Yes  No

## INFORMATION ABOUT YOUR VEHICLE

Complete this section **only** if you are claiming vehicle expenses

(Note: Driving to and from work is considered commuting and generally is not deductible)

What are you using the vehicle for in your business? \_\_\_\_\_

When did you place your vehicle in service for **business purposes**? (month/day/year) \_\_\_\_\_

What was the cost to purchase the vehicle? \_\_\_\_\_

Which method are you using this year?  Standard Mileage Rate  Actual Expenses

Which method did you use in the first year you used your vehicle for business?  Standard Mileage Rate  Actual Expenses

Of the total number of miles you drove the vehicle \_\_\_\_\_ how many miles was the vehicle used for:

a) Business \_\_\_\_\_ b) Commuting \_\_\_\_\_ c) Other \_\_\_\_\_

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 evidence to support your deduction?  Yes  No

## SUMMARY OF GROSS RECEIPTS

(If you did not use a log book to determine your gross receipts, enter the gross amount you received each month)

January	February	March	April	May	June
July	August	September	October	November	December

### SUMMARY OF EXPENSES

Advertising

(newspaper, signs business cards, etc)	\$ _____	Rent or Lease:	
Commissions and Fees	\$ _____	a) Vehicles, Machinery, Equipment	\$ _____
Contract Labor	\$ _____	b) Other Business Property	\$ _____
Prior Depreciation (provide copy of last year's depreciation worksheet)	\$ _____	Repairs and Maintenance	\$ _____
Purchased Items to Use in the Business with a Useful Life of Over a Year (List)	\$ _____	Supplies Used in the Business	\$ _____
	\$ _____	Taxes and Licenses	\$ _____
	\$ _____	Deductible Meals while Away Overnight	\$ _____
	\$ _____	Deductible Meals if a Daycare Facility	\$ _____
Employee Benefits Programs	\$ _____	Necessary Entertainment Expenses	\$ _____
Interest on Business Loans:		Utilities (telephones only if a second line in home)	\$ _____
a) Mortgage (paid to bank)	\$ _____	Other Expenses (identify)	\$ _____
b) Other	\$ _____		\$ _____
Legal and Professional Services	\$ _____		\$ _____
Cost of Last Year's Business Tax Return	\$ _____		\$ _____
Office Expenses	\$ _____		\$ _____

If you do NOT have any business expenses, please provide an explanation \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

I, acknowledge that I have receipts and records regarding my personal business in my possession. I have provided the above summary to Happy Tax for the preparation of my 20\_\_\_\_ individual tax return but did/did not provide them with all of the receipts and records.

Signature \_\_\_\_\_ Date \_\_\_\_\_