



2025 SMALL BUSINESS WORKSHEET

IDENTIFICATION

1. Client(s) who operates business: _____
2. Name of Business (if any): _____
3. Address of Business: _____
4. Federal TAX ID (if any): _____
5. Type of Business: _____

DOCUMENT REQUESTS

6. If you received a **1099** for Sales of Products, I would need a copy of the 1099. If you have 1099s from more than one source of income, then I will need all of them.

GROSS INCOME

7. Total of all income from all sources related to your business in 2025. This includes income reflected on a 1099 and income not reported on a 1099:

8. If you sell a tangible product, the total cost of all products (what you paid for them) sold in 2025: _____

BUSINESS EXPENSES

(if you're not sure where to put the expense, put it on the line you feel is best or under the section named Other Expenses. I will correctly categorize it.)

9. Advertising Expenses: _____

10. Total Miles related to your business in 2025: _____
11. Commissions and Fees:

12. Insurance Expenses: _____

13. Legal and Professional Services: _____

14. Office Expenses: _____

15. Rental expenses related to your business in 2025: _____

16. Supplies: _____

17. Taxes and Licenses: _____

18. Utilities for space NOT in your home (not for your home office or business use of your home):

19. Travel Costs related to your business in 2025: _____

20. Wages paid to employees in 2025: _____

21. OTHER Expenses related to your business in 2025:

BUSINESS USE OF HOME (HOME OFFICE) (talk to me about this before completing to make sure it will apply to your business)

- A. Square feet of home used exclusively for business (i.e. if you use a bedroom as an office, then the square footage of that converted bedroom): _____
- B. Total square feet of your home: _____
- C. If you rent, then the cost of rent for 2025: _____
- D. If you own, I will calculate the portion of your mortgage interest and property tax that will apply to your home office.
- E. Repairs and Maintenance for the designated space for your business:

- F. Total amount of Utilities paid for your entire home in 2025: _____
- G. Other Expenses paid for your home office or business use of your home in 2025:

NOTES: