

<b>Business Income &amp; Expenses Organizer</b>	<b>Tax Year:</b>
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This checklist is to be used as a guide and starting point for organizing Self Employment Business Income and Expenses and may not include all potential deductions/credits. If you have additional expenses or income, not included on the organizer that you feel could be used when preparing your income tax return, please document those in the NOTES section and discuss these with your tax preparer.

Please verify the information for accuracy as this information will be included on your tax return that will be submitted to the IRS. Additionally, it is the responsibility of the taxpayer to collect and retain all supporting documentation for your files.

Please bring the completed organizer with you to your appointment. Should you have additional questions, feel free to contact us by email: [dollartax@dollarincometax.com](mailto:dollartax@dollarincometax.com) or phone: 404-753-8048.

<b>Business Name</b>	<b>Federal ID #:</b>	
<b>Business Address:</b>	<b>Phone:</b>	
<b>City, State, Zip</b>	<b>Type of Business:</b>	

<b>Gross Income:</b>		<b>Purchases:</b>		<b>Ending Inventory:</b>	
<b>Beginning Inventory:</b>					

<b>Advertising:</b>		<b>Travel:</b>	
Samples:		Bus/Taxi/Air Fees:	
Gifts:		Lodging:	
Promotions:		Mileage:	Document these expenses on Vehicle/Auto Expense Form
Leads:		Parking/Tolls:	
Print Advertising:		Meals (While working out of Town):	
Radio/Television:		<b>Employment:</b>	
Social Media/Web:		Wages:	
Business Cards:		Payroll Taxes:	
Other:		Commissions:	
<b>Communications:</b>		Sub-contractor:	
Phone (Land line):		Other:	
Phone (Cell):		<b>Insurance Expenses:</b>	
Answering Service:		Business Liability:	
Web Access:		Errors & Omissions:	
Web Hosting/Domain:		Fire/Flood:	
Other:		Malpractice:	
<b>Postage/Shipping/Mailing:</b>		Surety Bonds:	
Postage:		Other:	
Delivery:		<b>Legal Fees:</b>	
Shipping Costs:		Business Property Taxes:	
PO Box Rental:		Licenses/Permits:	
Other:		Bank Fees:	
<b>Utilities:</b>		Other:	
Water/Sewage:		<b>Operating Costs:</b>	
Power:		Office Supplies:	
Sanitation:		Software:	
Security/Monitoring:		Materials/Job Supplies:	
Gas:		Other (Specify):	
Other:			

<b>Self-Employment Business Income &amp; Expenses Organizer</b>	<b>Page 2</b>
<b>Business Name:</b>	<b>Tax Year:</b>

<b>Trade Shows/Meetings:</b>		<b>Equipment:</b>	
Meeting/Seminar Fee:		Tool Purchase (See below)	
Promotional Events:		Rent /Lease:	
Demos:		Upkeep/Repair:	
Business Meals:		Other:	
Other:			
<b>Other Expenses:</b>		<b>Building/Maintenance:</b>	
Uniform & Upkeep		Rent/Lease:	
Other:		Janitorial Fees:	
		Office Maintenance:	
		Other:	

In this section, document any equipment purchases related to the conduct of business.			
<b>Equipment:</b>	<b>Date of Purchase:</b>	<b>Date In Service:</b>	<b>Cost:</b>

<b>Additional Notes:</b>	
<b>Preparer Signature:</b>	<b>Date:</b>