



Business or Client Name \_\_\_\_\_ Tax Year \_\_\_\_\_

**Self-Employment or Business Income & Expenses**

**Total Gross Business Income for Tax Year:** \$ \_\_\_\_\_ *\*Provide all forms 1099-NEC / 1099-K received*  
**Business Expenses:** *\*Provide a yearly total per applicable category below*

- **Vehicle(s) Used for Business:**  
 Purchased Date \_\_\_\_\_ Purchase Price \$ \_\_\_\_\_  
 Year \_\_\_\_\_ Make \_\_\_\_\_ Model \_\_\_\_\_  
*\*If more than one vehicle is used for business, provide the above information for each vehicle on back of sheet.*
- **Vehicle Expenses:**  
 Fuel \$ \_\_\_\_\_ Repairs / Maintenance \$ \_\_\_\_\_ Auto Insurance \$ \_\_\_\_\_  
 Loan Interest \$ \_\_\_\_\_ Tolls \$ \_\_\_\_\_  
 Total Miles Driven \_\_\_\_\_ Percentage of Business Use \_\_\_\_\_
- **Business Insurance:** Liability \$ \_\_\_\_\_ Workers Compensation \$ \_\_\_\_\_ Other \$ \_\_\_\_\_
- **Workers Compensation Exemption:** \$ \_\_\_\_\_
- **Cellular Service:** \$ \_\_\_\_\_ Percentage of business use \_\_\_\_\_
- **Inventory Purchased for Resale:** \$ \_\_\_\_\_
- **Supplies:** \$ \_\_\_\_\_ **Materials:** \$ \_\_\_\_\_
- **Contract Labor:** \$ \_\_\_\_\_
- **Equipment / Tools Purchased:** \$ \_\_\_\_\_ **Rented:** \$ \_\_\_\_\_
- **Repairs & Maintenance of Equipment / Tools:** \$ \_\_\_\_\_
- **Uniforms / Protective Wear:** \$ \_\_\_\_\_
- **Laundrying of Uniforms / Protective Wear:** \$ \_\_\_\_\_
- **Home Office Expenses:**  
 Total Sq Footage of Personal Home \_\_\_\_\_ Total Sq Footage Area used as Home Office \_\_\_\_\_  
 Rent or Mortgage Interest \$ \_\_\_\_\_ *\*If Homeowner, provide Mortgage Interest Statement from Lender.*  
 Property Taxes \$ \_\_\_\_\_ *\*If Homeowner, provide Property Tax Bill.*  
 Homeowner's Insurance \$ \_\_\_\_\_ *\*If Homeowner, provide yearly premiums paid.*  
 Mortgage Insurance (PMI) \$ \_\_\_\_\_  
 Homeowners Association Dues \$ \_\_\_\_\_  
 Repairs / Maintenance to Home \$ \_\_\_\_\_  
 Utilities: Internet \$ \_\_\_\_\_ Water \$ \_\_\_\_\_ Electricity \$ \_\_\_\_\_ Other \$ \_\_\_\_\_  
 Cable: \$ \_\_\_\_\_ Telephone Services \$ \_\_\_\_\_ *\*Do not include cellular services already included above*
- **Business Property Expenses:**  
 Rent or Mortgage Interest \$ \_\_\_\_\_ *\*If Business Property Owner, provide Mortgage Interest Statement from Lender.*  
 Property Taxes \$ \_\_\_\_\_ *\*If Business Property Owner, provide Property Tax Bill.*  
 Building Property Insurance \$ \_\_\_\_\_ *\*If Business Property Owner, provide yearly premiums paid.*  
 Business Property Owners Association Dues \$ \_\_\_\_\_  
 Repairs / Maintenance to Business Property \$ \_\_\_\_\_  
 Utilities: Internet \$ \_\_\_\_\_ Water \$ \_\_\_\_\_ Electricity \$ \_\_\_\_\_ Other \$ \_\_\_\_\_  
 Business Telephone \$ \_\_\_\_\_ *\*Do not include cellular services already included above*
- **Interest paid on Loans / Credit Cards used for business-use purchases** \$ \_\_\_\_\_ *\*Do Not include interest paid on business vehicle loans.*
- **Legal / Professional Fees, including Tax and Accounting Services** \$ \_\_\_\_\_
- **Advertising** \$ \_\_\_\_\_
- **Professional / Business Licenses** \$ \_\_\_\_\_
- **New Business Filing Fees or Annual Reporting Fees:** \$ \_\_\_\_\_
- **Subscription / Memberships / Business Association Fees:** \$ \_\_\_\_\_
- **Seminars / Entertainment / Professional Education Costs:** \$ \_\_\_\_\_
- **Other Business-related expense(s):** \_\_\_\_\_