

2023 Income and Expense Organizer

(Self-Employed and Single Member LLCs only)

Business Name:	Tax ID / EIN#
Owner's Name:	
Business Address:	
Type of Business:	Date Business Established:

ANNUAL INCOME	
INCOME ON 1099-MISC(s)	
INCOME ON 1099-K (from credit card processors)	
OTHER INCOME (not on 1099s)	
TOTAL GROSS INCOME:	

Did you make payments over \$600 to any person or single member LLC? Yes No

Did you issue 1099-Misc Forms to such? Forms are due **01/31/2024**. Yes No

Do you need us to prepare Forms 1099-Misc? (Additional fees will apply. Yes No
Provide name, SSN, address and amount for each person)

ANNUAL EXPENSES (fill in only what applies to your business – calculate per year)			
Advertising		Shipping/Postage	
Bank Service Fees (bus. account)		Supplies	
Commissions & Fees Paid to Others		Sales Tax Paid (provide sales tax returns)	
Contract Labor		Property taxes (for bus. property)	
Dues and Subscriptions		Licenses	
Health Insurance		Telephone/Internet Expenses	
Business Insurance		Travel	
Legal and Professional Fees		Meals (with employees or bus. clients)	
Office Expenses		Utilities (bus. space)	
Pension and profit sharing plans (SEP) / Provide contribution statement		Other:	
Rent (if you rent separate bus. space)		Other:	
Repairs/Maintenance (bus. space)		Other:	

ANNUAL BUSINESS VEHICLE EXPENSES			
Date Acquired	Vehicle Year, Make and Model		
Was vehicle? Purchased/Financed <input type="checkbox"/> Leased <input type="checkbox"/>	Purchase Price \$	Annual Lease Payments \$	Lease Downpayment \$
Annual Miles Driven for Business Purpose	Annual Miles Driven for All Purposes		
Gas \$	Repairs \$	Insurance \$	Parking/Tolls \$

ANNUAL HOME OFFICE EXPENSES			
Space Dedicated to Business (Sq Ft)		Total Home Space (Sq Ft)	
Rent or Mortgage Interest \$	Utilities \$	Insurance \$	Repairs \$
Other:		Other:	