

Self-Employment Organizer

Use this form to help organize your income and expenses for self-employment. If your business is ongoing, you must include a copy of your prior year return. Include a report of income/expenses from whatever software used to keep your books. Include copies of all forms 1099 you received for the business (1099-NEC, 1099-Misc, 1099-K, etc...). Remember, tax preparation is charged by the time to prepare the return. This form is to help organize things to speed up the preparation process.

Your Name: _____

General Business Information:

Business Name: _____ Date Started: _____

Business Product/Service: _____ EIN if you have one: _____

Business Phone: _____ Business Email: _____

Business Mailing Address: Street, City, State, ZIP

Street: _____ City: _____ State: _____ ZIP: _____

- Did you have any employees or independent contractors?
 - Are you required to issue any W-2s or 1099s?
 - Do you need assistance issuing the forms?
- Are your products/services subject to sales tax?
 - Have you filed a sales tax return and submitted sales tax?
 - Do you need assistance filing a sales tax return?
- Did you receive a small business loan as part of the Paycheck Protection Program?
 - Are you eligible to have the loan forgiven?

Income Information:

Include total gross income for the business.

Forms 1099-K: _____ Forms 1099-NEC: _____

Cash/check (not on tax forms): _____ Forms 1099-Misc: _____

Expense Information:

This is only a listing of some of the most common expenses. If you have additional expenses, please provide records and information on the expenses.

Advertising: _____	Insurance: _____
Website: _____	Payment processing fees: _____
Contract labor: _____	Licenses/taxes: _____
Office supplies: _____	Legal/professional services: _____
Other supplies: _____	Professional dues/trainings: _____
Business loan interest: _____	Business travel: _____
Equipment rental: _____	Business meals: _____
Cellphone plan: _____ Bus %: _____	Office/business space rental: _____
_____ : _____	_____ : _____
_____ : _____	_____ : _____
_____ : _____	_____ : _____

- Did you purchase any equipment? (Such as computer, smartphone, trailer, lawnmower, etc...)

Equipment	Purchase date	Cost	Business use %

- Do you have any inventory?

Start of year value	End of year value	Purchases	Material costs	Labor costs	Personal use

Do you have a home office?

Area used exclusively for business: _____ ft²

Total area of house or apartment: _____ ft²

Repairs and maintenance: _____

Utilities to entire unit: _____

Costs specific to business: _____

Rent: _____

Mortgage interest: _____

Property taxes: _____

Homeowner purchase price: _____

Date home first used in business: _____

Did you use a vehicle in your business?

Was it available for use during your off hours?

Did you have another vehicle available for personal use?

Do you have evidence to support claiming this vehicle?

Make/Model: _____

Date placed in service: _____

Business miles: _____

Loan interest: _____

Commuting miles: _____

Lease: _____

Personal miles: _____

Parking/tolls: _____

Did you have any business expenses not listed above?

Include records and information on the expenses.