

# Evans Legal



Services

## Self-Employment Organizer

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

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: \_\_\_\_\_

- I paid employees or independent contractors.
  - I am required to issue W-2s or 1099s
  - I need assistance issuing W-2s or 1099s
- My business sold goods or services subject to sales tax.
  - I have filed a sales tax return
  - I need assistance filing a sales tax return

### Income Information:

Include total gross income for the business.

Forms 1099-K: \_\_\_\_\_

Forms 1099-NEC: \_\_\_\_\_

Cash/check : \_\_\_\_\_

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: _____ | _____ |
| Loan interest: _____    | _____ | Business travel: _____             | _____ |
| Equipment rental: _____ | _____ | Business meals: _____              | _____ |
| Phone plan: _____       | _____ | Office space rental: _____         | _____ |
| _____ :                 | _____ | _____ :                            | _____ |
| _____ :                 | _____ | _____ :                            | _____ |
| _____ :                 | _____ | _____ :                            | _____ |

- I purchased equipment for my business. (Computer, smartphone, trailer, lawnmower, etc...)

| Equipment | Purchase date | Cost | Business use % |
|-----------|---------------|------|----------------|
|           |               |      |                |
|           |               |      |                |
|           |               |      |                |

- My business had ongoing inventory

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

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I had a home office.

Area used exclusively for business \_\_\_\_\_ ft<sup>2</sup>

Total area of house or apartment \_\_\_\_\_ ft<sup>2</sup>

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 \_\_\_\_\_

I used a vehicle in my business.

I used the vehicle for personal use as well.

I have written records of mileage and expenses

Make/Model: \_\_\_\_\_

Date placed in service \_\_\_\_\_

Business Mileage:

Loan interest \_\_\_\_\_

Before 7/1 \_\_\_\_\_ After 6/30 \_\_\_\_\_

Lease \_\_\_\_\_

Commuting \_\_\_\_\_ Personal \_\_\_\_\_

Parking/tolls \_\_\_\_\_

I had expenses not listed earlier. (Use the space below to explain the expenses)