

Are You Self-Employed?

Were you self-employed, ran your own business, or did you receive a Form 1099-MISC?

If so, check the statements below that apply to you.

- | | |
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| <p>_____ I paid employees.</p> <p>_____ I had more than \$25,000 in business expenses.</p> <p>_____ I kept an inventory for my business.</p> | <p>_____ I kept an office in my home.</p> <p>_____ I need to report a business loss.</p> <p>_____ I had more than one business.*</p> |
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If you answered YES to any of these, please stop here and bring your documents to the intake desk for review.

*Please complete a separate worksheet for each business. We can prepare returns including up to three businesses per taxpayer.

If you answered NO to all of these, please continue by completing the worksheet below.

Income and Expenses for Tax Year: _____

Income:

Cash, checks, 1099-K, etc. \$ _____

Preparer: enter under "Income" for the Schedule C.

Form 1099-MISC \$ _____

What industry/type of work did you do?

General Expenses:

Advertising \$ _____

Commissions and fees \$ _____

Health insurance premiums \$ _____

Business liability insurance \$ _____

Other interest \$ _____

(e.g. interest on loan for car used for business)

Legal & professional services \$ _____

Office expense/supplies \$ _____

Machinery/equipment rental \$ _____

Office and/or storage rent \$ _____

Repairs to equipment \$ _____

Supplies \$ _____

Equipment including computers \$ _____

Professional license/state taxes \$ _____

Overnight travel (hotel/airfare) \$ _____

Business meals (onsite only) \$ _____

Utilities (NOT household) \$ _____

Other Expenses:

Business phone \$ _____

Professional Education \$ _____

Protective clothing & shoes \$ _____

Small tools \$ _____

Other: _____ \$ _____

Car and Truck Expenses

Do not include miles from home to 1st job of day or last job of day to home. These are commuting miles.

Toll road fees/parking \$ _____

Number of business miles \$ _____

Vehicle type: _____ Year _____

Make _____

Model _____

Date placed in service _____

Rideshare drivers: use this table to assist in calculating income and mileage totals.

Ride service:	Uber	Lyft				Totals:
Miles driven						
Income reported on 1099-MISC						
Cash, checks, 1099-K amounts not reported on 1099-MISC						

