



SELF-EMPLOYMENT TAX ORGANIZER, TAX YEAR _____

MAIN BUSINESS INFORMATION

Your name: _____

Business name: _____

Business address, city, state, zip: _____

Business or profession: _____

Business telephone: _____

Business start date: _____
mm/dd/year

SELF-EMPLOYMENT INCOME

Form 1099-NEC	
Form 1099 K	
Total cash or check payments including tips	
Other income – grants, awards, etc	

- You do not need to bring receipts, but you should keep your documentation in case the IRS asks to see them

BUSINESS EXPENSES

Advertising	\$	Telephone & Long Distance Calls	\$
Business Liability Insurance	\$	Cell Phone Use Percentage	\$
Commissions & Fees	\$	Cell Phone Amount for Sch. C	\$
Health Insurance Premiums	\$	Cell Phone Annual Charges	\$
Legal & Professional Fees	\$	Utilities (not household)	\$
Office Supplies (paper, toner...)	\$	Dues or Publications for Professional Organizations	\$
Business Licenses	\$	Postage & Freight	\$
Business Meals & Entertainment	\$	Parking & Tolls	\$
Overnight Travel	\$	Uniforms	\$
Rent or Lease of Equipment & Property	\$	Professional Education	\$
Other	\$	Other	\$
Other	\$	Other	\$

*Unsure where to put something? Put it in "Other" and let us know what it is

VEHICLE INFORMATION

Month/Day/Year vehicle first used for business: / / Type of Vehicle:	
Mileage in 2021: business miles _____ commuting miles _____ personal miles _____	
Interest paid on car loan: \$	
Do you (or your spouse) have another vehicle available for personal use?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Was your vehicle available for personal use during off-duty hours?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do you have evidence to support your deduction?	<input type="checkbox"/> Yes <input type="checkbox"/> No
If yes, is the evidence in writing?	<input type="checkbox"/> Yes <input type="checkbox"/> No
For Uber or Lyft drivers, do you have the total online mileage summary?	<input type="checkbox"/> Yes <input type="checkbox"/> No

- Commuting Miles = first trip from home to work and last trip from work site to home
 Business Miles = miles between work sites
 Personal Miles = non-business-related miles

EXPENSES: MAJOR PURCHASES

Item	Month/Day/Year of Purchase	Cost	Business Use Percentage

ESTIMATED TAX PAYMENTS

Did you pay estimated tax payments to the IRS for Tax Year 2021	<input type="checkbox"/> Yes <input type="checkbox"/> No
If yes, how much? Note: Estimated tax payments are paying taxes in advance ex. Paying estimated tax payments in 2021 for tax year 2021	\$