

SELF-EMPLOYMENT TAX ORGANIZER, TAX YEAR _____

MAIN BUSINESS INFORMATION

Your name: _____

Business name: (leave blank if none) _____

Business address, city, state, zip: _____

Business or profession: _____

Business telephone: _____

Business start date: _____
mm/dd/year

SELF-EMPLOYMENT INCOME

Form 1099-NEC, K, Misc, etc)	
Other income - cash (including tips), checks, 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	\$	Cell Phone Annual Charges	\$
Health Insurance Premiums		Cell Phone Use Percentage (if used for both business/personal)	\$
Office Supplies (paper, toner...)	\$	Cell Phone Amount for Sch. C	\$
Professional Education	\$	Tools and Uniforms	\$
Rent or Lease of Equipment & Property	\$	Other	\$
Other	\$	Other	\$
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 2023: 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? You should have this available if the IRS requests it	<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 2023	<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 2022 for tax year 2023	\$