

## 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 sends a letter or notice asking for more information.

### 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 2024 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 2024	<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 2023 for tax year 2024	\$