

# Tax Organizer

## Self-Employment Info

Use the following to enter annual income and expenses.

Business Name	
Primary Business Function	
Business Address	

## Business Income

Revenue/Sales	
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## Business Expenses

Expenses should be ordinary and necessary for conducting business.

Payments to contractors Individuals not considered employees for whom a 1099 was filed	
Wages	
Payroll taxes	
Education	
Rent/lease of business workspace	
Rent/lease of business machinery/equipment	
Business utilities Utility expenses at business location, home utility expenses captured elsewhere	
Business insurance Liability, property, business auto/equipment, workers comp, employee health, etc.	
Repairs and maintenance To business property which does not add to property value or prolong its life Exclude business auto expenses, captured elsewhere	
Supplies/materials used in business services	
Small tools Purchases under \$500	
Office supplies Printer supplies, pens, software, etc.	

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Postage	
Bank charges	
Small office furniture/equipment Purchases under \$500	
Business registration	
Business license	
Professional license	
Business cards	
Advertising Newspaper, radio, community resources	
Email blasts	
Fliers, brochures	
Product samples Exclude items used personally	
Promotional items Pens, hats, letter openers, and other trinkets with business name	
Tax/Accounting services	
Legal services	
Other professional services	
Website development, maintenance, and fees	
Technical and other professional services	
Interest On business debts	
Travel Airfare, car rentals, hotel, taxi, etc. Exclude personal auto expenses, captured elsewhere	
Auto expenses of business vehicles Gas, repairs & maintenance, etc.	
Business meals Business being primary reason for meal w/ expectations of future business	
Business gifts Limited to \$25 per recipient	
Dues to clubs and organizations	

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Subscriptions to business publications	
Personal health insurance If you are not covered by an employer	
Other	

## Business Use of the Home

If you work from your home include the following for an area of your home used regularly and exclusively for business.

Square footage of area used for business	
Square footage of entire home	
Dates used for business Enter dates used if less than entire year	
Utilities for entire home Electric, gas, garbage, water, internet, security system	
Home or renter's insurance	
Repairs/Maintenance entire home	
Repairs/Maintenance to business area only	

## Personal Items Used Partially for Business

Description	% Business Use	Total Expense
Cell Phone Cost of new cell phone and usage bills		
Computer Cost of a new computer		
Description	Business Miles	Total Miles
Personal auto		

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## Business Assets

Office furniture/equipment Purchases over \$500	
Real Estate purchased Office building, warehouse, shop, etc.	
Vehicles (purchased or leased) For exclusive business use	
Large tools or machinery Purchases over \$500	

## SEP Contribution

Amount contributed to a self-employment retirement account.

Account	Amount

## Additional Information