



Self-Employment Income & Expenses Worksheet

Taxpayer _____

Tax Year	
Business Name	
Business EIN	

Documents Needed

- 1099-NEC, 1099-MISC, if received
- Depreciation schedule (if applicable) – new clients only

Income

Gross receipts or sales	
Returns & Allowances	
Other Income (please describe)	

Expenses

Advertising	
Bank Fees	
Credit Card & PayPal Fees	
Commissions and Affiliate Fees	
Contract Labor	
Dues and Subscriptions	
Employee Benefits	
Gifts	
Health Insurance	
Insurance (other than health and auto)	
Interest	
Legal & Professional Fees	
Licenses	
Office expenses	
Pension & Profit Sharing contributions	
Postage and Delivery	
Rent - Vehicle & Machinery	
Rent - Other	
Repairs and Maintenance	
Supplies	
Taxes Paid	
Local Taxes	

State Tax (i.e. CAT)	
Sales Tax	
Payroll Taxes	
Telephone	
Travel	
Meals	
Entertainment	
Utilities	
Wages	

Assets & Equipment - Large Purchases >\$2,500		
Description	Date placed in service	Cost

Auto Expenses	
Year, Make, & Model of Vehicle	
Total Mileage Driven	
Business Mileage Driven	
Purchase Price	
Lease Payments	
Auto Loan Interest Paid	
Fuel & Oil	
Registration	
Auto Repairs	
Auto Insurance	
Parking & Tolls	

Home Office	
Address of Home	
Purchase Price of Home	
Date First Used for Home Office	
Total Square Footage of Home	
Square Footage of Office	

Expenses for Entire Home	
Rent	
Mortgage Interest	
Property Taxes	
Homeowners/Renters Insurance	
Association Dues	
Gas	
Electric	
Water	
Phone	
Internet	
Other Utilities	
Repairs	
Maintenance	
Improvements	

Expenses for Home Office Only	
Furnishings	
Repairs	
Maintenance	
Other	