



Self-Employment Income & Expenses Worksheet

Taxpayer _____

Tax Year	
Business Name	
Business EIN	

Documents Needed
<ul style="list-style-type: none"> • 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	

