

## Are You Self-Employed?

**Were you self-employed, ran your own business, or did you receive a Form 1099-NEC?**

**If so, check the statements below that apply to you.**

- |  |                                     |
|--|-------------------------------------|
| I paid employees.                              | I kept an office in my home.        |
| I had more than \$35,000 in business expenses. | I need to report a business loss.   |
| I kept an inventory for my business.           | I had Marketplace Insurance         |
| I claim depreciation in my business.           | I use actual expenses for vehicles. |
| I am an accrual basis business, not cash basis | I am a Partnership or S-Corp        |

*If you answered **YES** to any of these, please stop here and call 920-968-6044 to discuss your business.*

*\*Please complete a separate worksheet for each business. We can prepare returns including up to three businesses per taxpayer.*

*If you answered **NO** to all of these, please continue by completing the worksheet below.*

**Income and Expenses for Tax Year: \_\_\_\_\_**

### Income:

Cash, checks, 1099-K, etc. \$ \_\_\_\_\_

*Preparer: enter under "Income" for the Schedule C.*

Form 1099-NEC \$ \_\_\_\_\_

### What industry/type of work did you do?

Business Code (from prior year return): \_\_\_\_\_

### General Expenses:

Advertising \$ \_\_\_\_\_

Commissions and fees \$ \_\_\_\_\_

Health insurance premiums \$ \_\_\_\_\_

Business liability insurance \$ \_\_\_\_\_

Other interest \$ \_\_\_\_\_

*(e.g. interest on loan for car used for business)*

Legal & professional services \$ \_\_\_\_\_

Office expense/supplies \$ \_\_\_\_\_

Machinery/equipment rental \$ \_\_\_\_\_

Office and/or storage rent \$ \_\_\_\_\_

Repairs to equipment \$ \_\_\_\_\_

Supplies \$ \_\_\_\_\_

Equipment including computers \$ \_\_\_\_\_

Professional license/state taxes \$ \_\_\_\_\_

Overnight travel (hotel/airfare) \$ \_\_\_\_\_

Business meals (onsite only) \$ \_\_\_\_\_

Utilities (NOT household) \$ \_\_\_\_\_

### Other Expenses:

Business phone \$ \_\_\_\_\_

Professional Education \$ \_\_\_\_\_

Protective clothing & shoes \$ \_\_\_\_\_

Small tools \$ \_\_\_\_\_

Other: \_\_\_\_\_ \$ \_\_\_\_\_

### Car and Truck Expenses

*Do not include miles from home to 1<sup>st</sup> job of day or last job of day to home in business mileage. These are commuting miles.*

Toll road fees/parking \$ \_\_\_\_\_

Business Miles: \_\_\_\_\_

Commuting Miles: \_\_\_\_\_

Other Miles (Personal): \_\_\_\_\_

Do you have a mileage log (required)?  Yes  No

Date vehicle was placed in service: \_\_\_\_\_

Year \_\_\_\_\_ Make \_\_\_\_\_ Model \_\_\_\_\_

**Rideshare drivers: use this table to assist in calculating income and mileage totals.**

Ride service:	Uber	Lyft				Totals:
Miles driven						
Income reported on 1099-NEC or 1099-MISC						
Cash, checks, 1099-K amounts not reported on 1099-NEC						