

Self-Employed Worksheet for the year of _____

- | | |
|--|---|
| <input type="checkbox"/> I paid employees or other individuals
<input type="checkbox"/> I had more than \$35,000 in business expenses
<input type="checkbox"/> I kept an inventory for my business
<input type="checkbox"/> I have assets to depreciate or deplete
<input type="checkbox"/> I want to defer part of my Social Security Tax | <input type="checkbox"/> I want to deduct a home office
<input type="checkbox"/> I received a Form 1095-A
<input type="checkbox"/> I need to report a business loss
<input type="checkbox"/> I don't use the Cash method of accounting
<input type="checkbox"/> I want to claim credit for sick or family leave |
|--|---|

If you checked any of the above, please stop here and speak with one of our Counselors.

If you checked none of these above, please continue by completing the worksheet below for EACH business.

Income	
Forms 1099 (-NEC, -MISC, -K)	\$
Cash, check, etc. (incl. tips)	\$
Business expenses	
Advertising	\$
Commissions and fees	\$
Health insurance premiums	\$
Business insurance (not for mortgage)	\$
Interest on business loans	\$
Office expense/supplies	\$
Rent (not home office)	\$
Repairs	\$
Supplies	\$
Licenses or fees	\$
Business use of car or truck	
Total mileage for year	mi.
Business miles	mi.
Commuting miles	mi.
Other Miles (personal)	mi.
Vehicle description:	
Date placed in service:	

Business expenses (cont)	
Business part of phone	\$
Training for this business	\$
Tools, etc. under \$2,500	\$
Travel away from home	\$
Other (specify)	\$
	\$
	\$
	\$
	\$
	\$
	\$
	\$
	\$
	\$
Car or truck expenses	
Car loan interest	\$
Parking, tolls	\$
Other (specify)	\$
	\$
	\$
	\$

Drivers - be sure you have with you:

- All forms 1099 **AND** the detail provided by the company (Door Dash, Lyft, Postmates, Uber, etc) - you need to download and print from each company site.
- Your trip miles **AND** your between-trip miles (do not include from home to first stop nor from the last stop to home).