

**SELF-EMPLOYMENT TAX ORGANIZER
AND TAX DEDUCTION FINDER WORKSHEET**

BUSINESS INFORMATION

CLIENT NAME: _____

BUSINESS NAME: _____

BUSINESS ADDRESS: _____

BUS. PHONE: _____ BUS. FAX: _____

BUSINESS INCOME

PLEASE ATTACH ALL 1099 FORMS RECEIVED

BUSINESS INCOME (OTHER THAN 1099) \$ _____

BUSINESS EXPENSES

For BUSINESS purposes only

TYPE OF EXPENSE	AMOUNT PAID	TYPE OF EXPENSE	AMOUNT PAID
Advertising	\$	Cell Phone - <i>per month</i>	\$
Business/Professional Dues, Membership Fees	\$	Gifts - <i>to customers</i>	\$
Insurance (GL, WC - <i>not health</i>)	\$	Health Ins. Premiums	\$
Interest Paid - Credit Cards	\$	Mortgage Interest	\$
Internet - <i>per month</i>	\$	Phone Line - <i>must be 2nd line</i>	\$
Professional Fees	\$	Travel	\$
Office Supplies	\$	Rent - <i>vehicle, machinery</i>	\$
Job Supplies	\$	Continuing Education	\$
Postage & Shipping	\$	Utilities	\$
Rent	\$	Taxes & Licenses	\$
Repairs & Maintained	\$	Office Expenses	\$
Meals & Entertainment	\$	Other: _____	\$

BUSINESS VEHICLE EXPENSES

TYPE OF EXPENSE	AMOUNT PAID	TYPE OF EXPENSE	AMOUNT PAID
Auto Insurance	\$	Gasoline	\$
Interest - <i>on vehicle note</i>	\$	Maintenance & Repair	\$
Parking & Tolls	\$	Vehicle Tax & Tax	\$

VEHICLE DESCRIPTION (*make and model*): _____

DATE PLACED IN SERVICE: _____ Is vehicle available for personal use (*check box*):

MILEAGE (JAN - JUNE): _____ MILEAGE (JULY-DEC): _____

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MAJOR BUSINESS EXPENDITURES

LIST MAJOR EXPENDITURES, SUCH AS OFFICE FURNITURE, COMPUTERS, MACHINERY, EQUIPMENT, ETC. THAT IS USED FOR ONLY YOUR BUSINESS AND PURCHASED DURING THE TAX YEAR.

DESCRIPTION OF ASSET	PURCHASE DATE	COST
		\$
		\$
		\$
		\$
		\$
		\$

ESTIMATED TAXES PAID

QUARTER	FEDERAL TAX	STATE TAX	DATE FEDERAL PAID	DATE STATE PAID*
FIRST - Due April 15th	\$	\$		
SECOND- Due June 15th	\$	\$		
THIRD - Due Sept 15th	\$	\$		
FOURTH - Due Jan 15th	\$	\$		

**state payment for 4th quarter must be made by Dec. 31st to be deductible in the current year*

NOTES
