

Business Name: \_\_\_\_\_

Tax Year: \_\_\_\_\_

**Self-Employed Business Tax Organizer**

**Income**

Gross Receipts: \$ \_\_\_\_\_  
 Does this number include sales tax? Yes [ ] – No [ ]  
 Other Income: \_\_\_\_\_ \$ \_\_\_\_\_  
 \_\_\_\_\_ \$ \_\_\_\_\_  
 \_\_\_\_\_ \$ \_\_\_\_\_  
 Sales Returns and or Refunds: \$ \_\_\_\_\_

**Home Office Expenses**

Total square footage of house: \_\_\_\_\_  
 Square footage for 100% business use: \_\_\_\_\_  
 Mortgage interest: \$ \_\_\_\_\_  
 Rent paid: \$ \_\_\_\_\_  
 Property taxes: \$ \_\_\_\_\_  
 Insurance: \$ \_\_\_\_\_  
 Repairs & Maintenance: \$ \_\_\_\_\_  
 Utilities: \$ \_\_\_\_\_  
 Telephone: \$ \_\_\_\_\_  
 Other: \_\_\_\_\_ \$ \_\_\_\_\_  
 \_\_\_\_\_ \$ \_\_\_\_\_  
 If used for a daycare please provide:  
 Hours per day used for daycare: \_\_\_\_\_  
 Days per year used for daycare: \_\_\_\_\_

**Cost of Goods/Services Sold**

Beginning of the year inventory at cost: \$ \_\_\_\_\_  
 Cost of purchases for resale: \$ \_\_\_\_\_  
 Materials purchased: \$ \_\_\_\_\_  
 Materials/Purchases for personal use: \$ \_\_\_\_\_  
 Cost of Subcontractors: \$ \_\_\_\_\_  
 End of year inventory at cost: \$ \_\_\_\_\_

**Expenses**

Advertising: \$ \_\_\_\_\_  
 Commissions and Fees: \$ \_\_\_\_\_  
 Employee Benefits: \$ \_\_\_\_\_  
 Insurance Expense: \$ \_\_\_\_\_  
     Self-Employed Health: \$ \_\_\_\_\_  
     Life Insurance Premiums: \$ \_\_\_\_\_  
 Mortgage Interest (Paid to Banks): \$ \_\_\_\_\_  
 Other Interest Paid: \$ \_\_\_\_\_  
 Legal & Professional Fees: \$ \_\_\_\_\_  
 Office Expenses: \$ \_\_\_\_\_  
 Pension & Profit Sharing Expense: \$ \_\_\_\_\_  
 Rent or Lease of Equipment: \$ \_\_\_\_\_  
 Rent or Lease of Buildings, etc.: \$ \_\_\_\_\_  
 Repairs & Maintenance: \$ \_\_\_\_\_  
 Supplies (Not for Resale): \$ \_\_\_\_\_  
 Property Taxes (business property): \$ \_\_\_\_\_  
 Payroll Taxes: Employer's FICA: \$ \_\_\_\_\_  
     FUTA: \$ \_\_\_\_\_  
     SUTA: \$ \_\_\_\_\_  
 Licenses & Permits: \$ \_\_\_\_\_  
 Travel Expenses: \$ \_\_\_\_\_

Business Meals & Entertainment: \$ \_\_\_\_\_  
 Utilities: \$ \_\_\_\_\_  
 Telephone: \$ \_\_\_\_\_  
 Gross Wages Paid: \$ \_\_\_\_\_  
 Other Expenses Not Listed Elsewhere:  
 \_\_\_\_\_ \$ \_\_\_\_\_  
 \_\_\_\_\_ \$ \_\_\_\_\_  
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 \_\_\_\_\_ \$ \_\_\_\_\_

**Vehicle Expenses**

Description: \_\_\_\_\_  
 Date Placed in Service: \_\_\_\_\_  
 Gasoline & Oil: \$ \_\_\_\_\_ \$ \_\_\_\_\_  
 Repairs & Maint.: \$ \_\_\_\_\_ \$ \_\_\_\_\_  
 Insurance: \$ \_\_\_\_\_ \$ \_\_\_\_\_  
 Interest: \$ \_\_\_\_\_ \$ \_\_\_\_\_  
 Licenses: \$ \_\_\_\_\_ \$ \_\_\_\_\_  
 Total Mileage: \_\_\_\_\_  
 Business Mileage: \_\_\_\_\_  
 Commuting Mileage: \_\_\_\_\_  
 Odometer on 12/31: \_\_\_\_\_

**New Assets and Major Improvements**

| Description: | Used? | Date in Service: | Cost:    |
|--------------|-------|------------------|----------|
| _____        | _____ | _____            | \$ _____ |
| _____        | _____ | _____            | \$ _____ |
| _____        | _____ | _____            | \$ _____ |
| _____        | _____ | _____            | \$ _____ |
| _____        | _____ | _____            | \$ _____ |
| _____        | _____ | _____            | \$ _____ |
| _____        | _____ | _____            | \$ _____ |
| _____        | _____ | _____            | \$ _____ |
| _____        | _____ | _____            | \$ _____ |
| _____        | _____ | _____            | \$ _____ |
| _____        | _____ | _____            | \$ _____ |

I (We, if filing jointly) acknowledge that the above information provided by me is true and accurate to the best of my knowledge. I hereby relieve IF CONSULTANTS, its agents and affiliates, from any liability whatsoever, regarding the preparation of (this/these) tax returns. I agree to hold them harmless from any damages I may suffer and understand that my sole relief is limited to the return of any fee paid for the preparation of these tax documents. I (we) guarantee payment of the preparation fee and any related charges. An electronicsignature has the same legal significance as my written signature.