

Self-employed / Sole Proprietor Tax Organizer

Income

Business Income	Amount
	\$
	\$
	\$
	\$

Expense

Expense	Amount	Expense	Amount
Operating Expenses		Travel/Entertainment	
Advertising	\$	Number of whole days out of town:	
Commissions and Fees	\$	Airfare	\$
Business Insurance	\$	Car Rental	\$
Interest – Mortgage	\$	Lodging	\$
Interest – Other	\$	Other	\$
Legal/Accounting Fees	\$	Other	\$
Office Expense	\$	Other	\$
Rent – Machine/Equipment	\$	Business Meals	\$
Rent – Other Property	\$	Business Gifts	\$
Postage	\$		
Taxes – Real Estate	\$	If you Maintain Inventory...	
Sales Tax	\$	Beginning Inventory	\$
Office Phone/Long Distance	\$	Cost of Purchases	\$
Cell Phone/Pager	\$	End of Year Inventory	\$
Office Utilities	\$		
Bank Charges	\$	If you have Employees...	
Dues & Publications	\$	Employer ID <i>Number</i> :	
Continued Education & Seminars	\$	Gross Wages Paid	\$
Office Supplies	\$	FICA	\$
Uniforms / Cleaning	\$	State Unemployment	\$
Tools	\$	Federal Unemployment	\$
Safety Equipment	\$	Workers' Compensation	\$
Repairs	\$	Emp. Benefit Programs	\$
Licenses & Bonds	\$		
SE Medical Insurance	\$	If you purchased New Equipment... (Date, Item and Cost)	
Other	\$		
Automobile Expenses			
Total Miles Driven on Car	\$		
Total Business Miles Driven	\$	Other	\$
Car Loan Interest	\$	Other	\$
License Tabs	\$	Other	\$
Year and Make		Other	\$
Date of Purchase		Other	\$
		Other	\$
		Other	\$

Sole Proprietor / Self-employee Income and Expenses (con't)

If you have Daycare or Office in your Home...

Expense		Expense		Amount
Business Info		Misc.		
Date Home Acquired		Homeowners or Renters Insurance		\$
Date Converted to Business		Real Estate Taxes		\$
Sq. Ft. Total Living Area		Apartment Rent		\$
Sq. Ft. Used as Business	\$			
Cost of Home	\$	Daycare		
Cost of Improvement	\$	Food Cost		\$
Repairs/Maintenance to Business	\$	Payments from Food Programs		\$
Repairs/Maintenance to Business	\$	Toys		\$
Repairs/Maintenance to Business	\$	Educational Supplies		\$
Utilities		Expenses for Outings		\$
Heat	\$	Hours of Operation		\$
Water & Sewer	\$	Other		\$
Electric	\$	Other		\$
Trash	\$	Other		\$