

Tax Organizer for Self-Employed Individuals

This form can help you organize your business expenses for the year. Please fill it out as much as you can and bring it with you when you come in for your tax preparation appointment. If you prefer, feel free to email or fax it to us, so that we can begin to prepare your taxes.

A. Business Information

Name of Business:

Profession:

B. Income

Amount of Gross Receipts:

[Please attach all 1099 forms that you received, which are related to your self-employment income.]

C. Expenses

Please list the amount of each type of expense that you incurred in 2004:

1. **Advertising:**
2. **Commissions and fees:**
3. **Health insurance:**
4. **Other insurance:**
5. **Mortgage interest:**
6. **Other interest:**
7. **Legal and accounting fees:**
8. **Allocation of tax preparation fees:**
9. **Office expenses:**
10. **Rent/ vehicles:**
11. **Rent/ equipment:**

- 12. **Rent/ building:**
- 13. **Repairs and maintenance/building:**
- 14. **Repairs and maintenance/ equipment:**
- 15. **Repairs and maintenance/ vehicles:**
- 16. **Supplies:**
- 17. **Business Telephone:**
- 18. **Licenses and Fees:**
- 19. **Out-of- Town Business Travel Expenses:**

Lodging Expenses:

Transportation Expenses:

Meal Expenses:

If you traveled to multiple locations, please list the following for each trip:

<i>Travel Location</i>	<i># of Days at Location</i>
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- 20. **Meals and entertainment:**
- 21. **Utilities:**
- 22. **Wages and Consulting Expenses:**
- 23. **Management fees:**
- 24. **Business Miles Driven during the year:**
- 25. **Client gifts (limited to \$25 each):**
- 26. **Education and seminars:**
- 27. **Union Dues:**

28. Other Expenses:

Type of Expense *Amount*

D. Business Use of Home

1. Do you use any part of your home regularly and exclusively for business?

Yes _____ No _____

2. Total area of home:

3. Total area of home used regularly for business:

4. Expenses:

<i>Type</i>	<i>Direct Costs (costs which benefit only business portion of home)</i>	<i>Indirect Costs (other costs)</i>
Home Insurance		
Repairs & Maintenance		
Utilities		
Rent		
Other		

Please feel free to contact us if you would like to discuss this form:

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