

SELF-EMPLOYMENT TAX ORGANIZER

(to be used for any income paid on a 1099-MISC, box 7, or paid by cash or check and not reported on a W2)

MAIN INFORMATION	
Type of Business or Profession	
Business Name (if there is one)	
Business Address (if there is one)	
Business Telephone (if there is one)	
Business Start Date	

INCOME	
Total from Form(s) 1099	\$
Total of all other payments received by cash or check not reported on Form(s) 1099.	\$
Prizes, awards, gifts received for direct sales of products such as Tupperware or Avon not included above.	\$
TOTAL GROSS INCOME	\$

INCOME Detail	
<p>Describe how you arrived at the total of payments received by cash or check not reported on Form(s) 1099. Did you keep a running log of cash and checks received? Did you look at your bank records for deposits? (You should create a detailed list for your records.) If you estimated, please describe how you arrived at the estimate. Example. I cleaned houses 2 times a week and was paid \$XX each time. I did not work for 2 weeks at the end of the year. So 2 times a week x \$XX x 50 weeks = \$YYY.</p>	

BUSINESS EXPENSES			
<p>See the instructions for Schedule C (http://www.irs.gov/pub/irs-pdf/i1040sc.pdf) for descriptions of what is included in each expense category. If you have expense items with an * you will more than likely be out of scope for the VITA program and need to seek professional tax assistance.</p>			
<p>*****If you estimated any expenses, describe/document how you arrived at the estimate.*****</p>			
Advertising	\$	Business meals & entertainment*	\$
Commissions and fees	\$	Overnight travel	\$
Contract labor (if you paid someone \$600 or more you may need to file Form 1099-MISC as a payer and VITA cannot help with this)	\$	Telephone & long distance calls (Only second phone line into the home is allowed as an eligible expense.)	\$
Business liability insurance	\$	Bank charges	\$
Interest on business loans or business credit cards (must have a separate card)	\$	Public transportation expenses. (Only include trips from one job to another or from an employment center to the job site. Do not include trips that began or ended at your home.)	\$
Legal and professional fees	\$	Professional Education	\$
Office supplies	\$	Freight and postage	\$
Rent or lease of equipment & property	\$	Dues and publications	\$
Repairs & maintenance of equipment	\$	Utilities (other than household)	\$
Other supplies	\$	Wages*	\$
Taxes and licenses	\$	Pension and profit sharing*	\$
	\$	Other expenses	\$

VEHICLE INFORMATION

The VITA program can only help with mileage expenses. If you have taken direct vehicle expenses for this vehicle in the past, you will need to seek professional tax assistance.

Document your mileage. You can use on-line mapping software to find mileage for specific routes.

Month/day/year your vehicle was placed in service: ____/____/____

Total business miles:

Total commuting miles:

Total personal miles:

Parking and tolls: \$

Do you (or your spouse) have another vehicle for personal use? Yes No

Was your vehicle available for personal use during off-duty hours? Yes No

Do you have evidence to support your deduction? Yes No

If yes, is the evidence written? Yes No

EXPENSES: Office in Home

If you have home office expenses, the VITA program cannot preparer your tax return. You need to seek professional tax assistance.

Area used for business or storage	Sq ft
Total area of home or apartment	Sq ft
Rent	\$
Mortgage interest	\$
Real estate taxes	\$
Renter or homeowner insurance	\$
Repairs and maintenance	\$
Gas and electric	\$
Water and sewer	\$
If homeowner, date the home was (a) purchased and (b) placed into business use.	(a) ____/____/____ (b) ____/____/____

EXPENSES: Major purchases & prior year depreciation

If you have depreciation expenses, the VITA program cannot preparer your tax return. You need to seek professional tax assistance.

New item purchased in current tax year	Date of Purchase	Cost
	/ /	\$
	/ /	\$
	/ /	\$

Expenses: PRODUCTS SOLD BY DIRECT SELLER

If you have inventory, the VITA program cannot preparer your tax return. You need to seek professional tax assistance.

Dollar value of Inventory at the beginning of the year	\$
Products purchased during the year	\$
Cost of products taken for personal use	\$
Supplies added to product for resale	\$
Other costs	\$
Dollar value of Inventory at the end of the year	\$