

SELF EMPLOYMENT WORKSHEET

GENERAL INFORMATION	
BUSINESS NAME _____	EIN _____
BUSINESS BELONGS TO TAXPAYER <input type="checkbox"/> SPOUSE <input type="checkbox"/> BOTH <input type="checkbox"/>	
TYPE OF BUSINESS OR SERVICE: _____	
IS YOUR BUSINESS REGISTERED AS AN LLC? YES <input type="checkbox"/>	
DO YOU HAVE A SEPARATE BUSINESS BANK ACCOUNT? YES <input type="checkbox"/> NO <input type="checkbox"/>	
ACCOUNTING METHOD: CASH <input type="checkbox"/> ACCRUAL <input type="checkbox"/> OTHER <input type="checkbox"/>	
DO YOU HAVE INVENTORY? YES <input type="checkbox"/> NO <input type="checkbox"/>	
DID YOU START THIS BUSINESS IN 2023? YES <input type="checkbox"/>	
DID YOU CLOSE THIS BUSINESS IN 2023? YES <input type="checkbox"/>	

INCOME	\$
GROSS INCOME FROM SELF EMPLOYMENT (INCLUDE CASH, CHECKS, CREDIT CARDS, PAY PAL AND OTHER ELECTRONIC PAYMENTS, DO NOT ICLUDE W-2/OTHER INCOME NOT FROM SELF EMPLOYMENT)	\$ _____

BUSINESS EXPENSES	\$		\$	
ADVERTISING (BUSINESS CARDS, WEB SITE, ADS)	\$	LOCAL MEALS	\$	
AUTO —PLEASE FILL OUT AUTO WORKSHEET		LOCAL TRAVEL	\$	
BANK FEES/MERCHANT SERVICES	\$	OFFICE AND POSTAGE/SHIPPING	\$	
COMMISSIONS AND FEES	\$	PARKING/TOLLS	\$	
CONTRACT LABOR (ANY CONTRACTOR YOU PAID \$600 OR MORE IN 2021 SHOULD RECEIVE A 1099-NEC FORM)	\$	RENT AND UTILITIES (EQUIPMENT/OFFICE SPACE)	\$	
QUALIFY FOR 1099? <input type="checkbox"/> ISSUED? <input type="checkbox"/>	\$	REPAIRS AND MAINTENANCE	\$	
COST OF GOODS SOLD —SEE OTHER SIDE	\$	SOFTWARE	\$	
DUES AND SUBSCRIPTIONS	\$	SUPPLIES AND SMALL TOOLS (LESS THAN 1 YEAR LIFE)	\$	
EMPLOYEE BENEFITS	\$	TAXES AND LICENSES (TRIMET, CITY OF PORTLAND, OFFICE PROPERTY TAX, BUSINESS LICENSE)	\$	
EMPLOYEE HEALTH INSURANCE	\$	TRAVEL: SEE OTHER SIDE		
EQUIPMENT —PLEASE SEE OTHER SIDE		UTILITES—CELL PHONE	\$	
		TOTAL COST:		
		% BUSINESS USE		%
		UTILITIES—HOME INTERNET	\$	
		TOTAL COST:		
		% BUSINESS USE		%
%HEALTH INSURANCE PREMIUMS (SELF/FAMILY)		WAGES: PLEASE PROVIDE A PAYROLL SUMMARY		

LIABILITY INSURANCE/BOND/WORKERS COMP	\$	OTHER:	
INTEREST (BUSINESS CREDIT CARDS, LOANS)	\$		
LAUNDRY/CLEANING/JANITORIAL	\$		

CITY OF PORTLAND/MULTNOMAH COUNTY (attach Quickbooks report "Income by Client Summary, or)

SALES TO CLIENTS IN THE CITY OF PORTLAND \$ _____

SALES TO CLIENTS IN MULTNOMAH COUNTY \$ _____

TRAVEL EXPENSES

CITY	# OF DAYS	AIRFARE	HOTEL	BUS/TAXI	CAR RENTAL	FUEL	OTHER

EQUIPMENT

DESCRIPTION OF ITEM	DATE PURCHASED	COST
		\$
		\$
		\$
		\$
		\$
		\$

COST OF GOODS SOLD

DO YOU MANUFACTURE OR PRODUCE A PRODUCT FOR SALE TO CUSTOMERS	YES <input type="checkbox"/> NO <input type="checkbox"/>
DO YOU MAINTAIN INVENTORY?	YES <input type="checkbox"/> NO <input type="checkbox"/>
STARTING INVENTORY	\$
PURCHASES LESS ITEMS WITHDRAWN FOR PERSONAL USE	\$
COST OF LABOR TO MANUFACTURE OR ASSEMBLE GOODS	\$
MATERIALS AND SUPPLIES	\$
ENDING INVENTORY	\$

NOTES: