

SELF EMPLOYMENT WORKSHEET

FOR TAX YEAR: _____

GENERAL QUESTIONS:

Business Name: _____

EIN(if applicable) ____ -- _____

Opened in 2024? Closed in 2024?

IS YOUR BUSINESS REGISTERED AS AN LLC? YES NO

If yes, have you filed a Beneficial Owner Information report with FINCEN? YES NO

Business Owner: TAXPAYER SPOUSE BOTH

Accounting Method: CASH ACCRUAL OTHER

Do you maintain inventory to sell to clients? Yes No

Do you have a separate business bank account? Yes No

Please provide a short description of your business:

[Empty text box for business description]

SELF EMPLOYMENT INCOME (In place of filling our income and expenses here, you can send us a report from accounting software or from your bookkeeper.)

Include cash, checks, credit card payments, PayPal, Venmo, other electronic payments, Square or other merchant services income

***Do not include W2 wages or other income NOT from self employment*

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Gross Income from self-employment \$ _____

Sales in City of Portland \$ _____

Sales in Multnomah County \$ _____

EXPENSES

NOTES FOR:

AUTO EXPENSES—Please fill out an AUTO worksheet (mileage or actual expenses)

EMPLOYEE WAGES, BENEFITS AND HEALTHCARE—Please provide a 2024 payroll summary

HOME OFFICE—Please fill out the HOME OFFICE worksheet

ADVERTISING (Business Cards, Web Site, Ads)	\$	LOCAL MEALS —Meals with Clients or Colleagues	\$
BANK FEES/MERCHANT SERVICES/CREDIT CARD PROCESSING	\$	LOCAL TRAVEL —Bus, Uber, Lyft, Taxi	\$
COMMISSIONS AND FEES —Sales Commission, Dump Fees	\$	REPAIRS AND MAINTENANCE	\$
CONTRACT LABOR (ANY CONTRACTOR YOU PAID \$600 OR MORE IN 2024 by cash or check they SHOULD RECEIVE A 1099-NEC FORM) <i>If there is a number in this box, please answer the questions below</i>	\$	LEGAL/PROFESSIONAL Cleaning, accounting, web design, photography, planning and advising	\$
Were any contractors paid more than \$600? <input type="checkbox"/> Were 1099-NEC forms issued? <input type="checkbox"/>	\$	RENT AND UTILITIES —Office Space OUTSIDE the home	\$
DUES AND SUBSCRIPTIONS —Professional Organizations, Business Publications	\$	SUPPLIES AND SMALL TOOLS	\$
HEALTH INSURANCE PREMIUMS (SELF/FAMILY)	\$	TAXES AND LICENSES (Trimet, City of Portland, Business License, Professional License)	\$
INSURANCE —Liability Insurance, Workers Comp, Bond	\$	UTILITIES—CELL PHONE TOTAL COST: \$ % BUSINESS USE UTILITIES—HOME INTERNET TOTAL COST: \$ % BUSINESS USE	\$ \$

SELF EMPLOYMENT WORKSHEET

OFFICE SUPPLIES AND SMALL EQUIPMENT —paper, printer ink, envelopes	\$ _____	PARKING/TOLLS NOT ALREADY ON AUTO WORKSHEET	\$ _____
SOFTWARE —Apps, Online Storage, Business Programs	\$ _____	EQUIPMENT RENTAL:	

EQUIPMENT (ITEMS LASTING LONGER THAN 1-2 YEARS)

DESCRIPTION OF ITEM	DATE	COST

TRAVEL

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

COST OF GOODS SOLD

STARTING INVENTORY	\$
PURCHASES (LESS ITEMS FOR PERSONAL USE)	\$
COST OF LABOR (ASSEMBLY/MANUFACTURING)	\$
MATERIALS AND SUPPLIES	\$
ENDING INVENTORY	\$

NOTES/ADDITIONAL INFORMATION: