# SELF EMPLOYMENT WORKSHEET

FOR TAX YEAR: _____

GENERAL QUESTIONS:

Business Name_____ EIN( if applicable) __ __--__ __ __ __ __ __ __

Opened in 2025? ☐ Closed in 2025? ☐

IS YOUR BUSINES REGISTERED AS AN LLC? 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:

SELF EMPLOYMENT INCOME (In place of filling out 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.W8.wages.or.other.income.NOT.from.self_employment

Gross Income from self-employment $_____

Sales in City of Portland $_____

Sales in Multnomah County $_____

Sales in Clackamas/Washington County $_____

Sales in Lane County $_____

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**Did you receive tips? If yes, please provide 1099 K or 1099 NEC showing tips received or provide a contemporaneous tip log.

EXPENSES

NOTES FOR:

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

EMPLOYEE WAGES, BENEFITS AND HEALTHCARE—Please provide a 2025 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 2025 by cash or check they SHOULD RECEIVE A 1099-NEC FORM)<br>If there is a number in this box, please answer the questions below | $ | LEGAL/PROFESSIONAL Cleaning, accounting, web design, photography, planning and advising | $ |
| Were any contractors paid more than $600? ☐<br>Were 1099-NEC forms issued?.☐ | $ | 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<br>(Tri-met, City of Portland, Business License, Professional License) | $ |
| INSURANCE—Liability Insurance, Workers Comp, Bonds | $ | UTILITES—CELL PHONE<br>TOTAL COST: $<br>% BUSINESS USE<br>UTILITIES—HOME INTERNET<br>TOTAL COST: $<br>% BUSINESS USE | $<br><br><br>$ |
| OFFICE SUPPLIES AND SMALL EQUIPMENT—paper, printer ink, envelopes | $<br>_____ | PARKING/TOLLS NOT ALREADY ON AUTO WORKSHEET | $ |
| SOFTWARE—Apps, Online Storage, Business Programs | $ | EQUIPMENT RENTAL: | |

# SELF EMPLOYMENT WORKSHEET

## EQUIPMENT (ITEMS LASTING LONGER THAN 1-2 YEARS)

| DESCRIPTION OF ITEM | DATE | COST |
|---|---|---|
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## TRAVEL

| CITY | # DAYS | AIRFARE | CAR RENTAL | FUEL FOR RENTAL CAR | TAXI/ BUS/ UBER | HOTEL | OTHER |
|---|---|---|---|---|---|---|---|
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## COST OF GOODS SOLD

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|---|---|
| STARTING INVENTORY (WHOLESALE COST)If number does not match ending inventory form last year, attach explanation | $ |
| PURCHASES (LESS ITEMS FOR PERSONAL USE) | $ |
| COST OF LABOR (ASSEMBLY/MANUFACTURE) | $ |
| MATERIALS AND SUPPLIES | $ |
| ENDING INVENTORY (WHOLESALE COST) | $ |

## NOTES/ADDITIONAL INFORMATION: