

Self-Employed Worksheet Checklist

What is your type of business? _____

(Complete a separate worksheet for each business)

- | | |
|--|--|
| <input type="checkbox"/> I paid employees or other individuals | <input type="checkbox"/> I need to report a business loss |
| <input type="checkbox"/> I want to deduct a home office | <input type="checkbox"/> I have assets to depreciate |
| <input type="checkbox"/> I had more than \$35,000 in business expenses | <input type="checkbox"/> I don't use the cash method of accounting |
| <input type="checkbox"/> I kept an inventory for my business | |

- If you checked any of the above, your business income may be out of scope for VITA. Ask a VITA team member.
- If you checked none of these above, please continue by completing the worksheet below for each business.

Income

Forms 1099 (-NEC, -MISC, -K)	\$
Cash, checks, etc. (incl. tips)	\$

Business expenses

Advertising	\$
Commissions and fees	\$
Health insurance premiums	\$
Business insurance	\$
Interest on business loans	\$
Office expense/supplies	\$
Rent (not home office)	\$
Repairs	\$
Supplies	\$
Licenses or fees	\$

Business expenses (continued)

Business part of phone	\$
Training for this business	\$
Tools, etc. under \$2,500 each	\$
Travel away from home	\$
Other (specify)	

Business use of car or truck

Total mileage for year	miles
Business miles	miles
Commuting miles	miles
Other miles	miles
Vehicle description:	
Date placed in service:	

Drivers – (Door Dash, Lyft, Postmates, Uber, etc.) – be sure you have with you:

- All Forms 1099 **AND** the detail provided by the company – you need to download and print the detail from each company's site.
- Your trip miles **AND** your between-trip miles (do not include from home to first stop nor from last stop to home).