

Self Employment Worksheet

BUSINESS OR PROFESSION _____ BUSINESS NAME _____

BUSINESS ADDRESS, CITY, STATE, ZIP (if any) _____

EMPLOYER ID NUMBER (if any) _____

Are you the owner of the business? ☐ Yes ☐ No *If yes, use Schedule C.*

Is the business a D.B.A.? ☐ Yes ☐ No *If yes, use Schedule C.*

Is the business a Partnership? ☐ Yes ☐ No *If yes, use Form 1065 K-1*

Is the business an LLC? ☐ Yes ☐ No *If yes, the default filing for a single member LLC is filing Schedule C with the individual return. The default for a multi-member LLC is filing Form 1065 as a partnership unless the entity has applied to be taxed as a different type of entity.*

Is the business a Corporation? ☐ Yes ☐ No *If yes, a corporation will file either Form 1120 or 1120S, depending on the type of corporation.*

Did you use a log book to determine your gross receipts? ☐ Yes ☐ No

If you did NOT use a log book, can you reasonably reconstruct your Gross Receipts? ☐ Yes ☐ No

Did you use a log book to determine your expenses? ☐ Yes ☐ No

If you did NOT use a log book, can you reasonably reconstruct your expenses? ☐ Yes ☐ No

How were you paid (check all that apply)? ☐ Cash ☐ Check ☐ Other

Did you receive a Form 1099-MISC, box 7 income? ☐ Yes ☐ No

Did you receive any other income not reported on Form 1099-MISC? ☐ Yes ☐ No

Did you receive a Form 1099-K for income? ☐ Yes ☐ No

Did you pay anyone to work for you? ☐ Yes ☐ No *If yes, how much? \$ _____*

Did you issue them a Form 1099-MISC or Form W-2? ☐ Yes ☐ No

INFORMATION ABOUT YOUR VEHICLE

Complete this section only if you are claiming vehicle expenses

(Note: Driving to and from work is considered commuting and generally is not deductible)

What are you using the vehicle for in your business? _____

When did you place your vehicle in service for **business purposes**? (month/day/year) _____

What was the cost to purchase the vehicle? _____

Which method are you using this year? ☐ Standard Mileage Rate ☐ Actual Expenses

Which method did you use in the first year you used your vehicle for business? ☐ Standard Mileage Rate ☐ Actual Expenses

Of the total number of miles you drove the vehicle during 2016, how many miles was the vehicle used for:

a) Business _____ b) Commuting _____ c) Other _____

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

Was another vehicle available for personal use? ☐ Yes ☐ No

Do you have written evidence to support your deduction? ☐ Yes ☐ No

SUMMARY OF GROSS RECEIPTS

(If you did not use a log book to determine your gross receipts, enter the gross amount you received each month)

January	February	March	April	May	June
July	August	September	October	November	December

SUMMARY OF EXPENSES

Advertising

(newspaper, signs business cards, etc)	\$ _____	Rent or Lease:	
Commissions and Fees	\$ _____	a) Vehicles, Machinery, Equipment	\$ _____
Contract Labor	\$ _____	b) Other Business Property	\$ _____
Prior Depreciation (provide copy of last year's depreciation worksheet)	\$ _____	Repairs and Maintenance	\$ _____
Purchased Items to Use in the Business with a Useful Life of Over a Year (List)	\$ _____	Supplies Used in the Business	\$ _____
	\$ _____	Taxes and Licenses	\$ _____
		Deductible Meals while Away	
	\$ _____	Overnight	\$ _____
		Deductible Meals if a Daycare	
	\$ _____	Facility	\$ _____
Employee Benefits Programs	\$ _____	Necessary Entertainment Expenses	\$ _____
		Utilities (telephones only if a second line in home)	\$ _____
Interest on Business Loans:		Other Expenses (identify)	\$ _____
a) Mortgage (paid to bank)	\$ _____		\$ _____
b) Other	\$ _____		\$ _____
Legal and Professional Services	\$ _____		\$ _____
Cost of Last Year's Business Tax Return	\$ _____		\$ _____
Office Expenses	\$ _____		\$ _____

If you do NOT have any business expenses, please provide an explanation _____

I, acknowledge that I have receipts and records regarding my personal business in my possession. I have provided the above summary to Happy Tax for the preparation of my 2016 individual tax return but did/did not provide them with all of the receipts and records.

Signature _____ Date _____