Self-employed income and expense worksheet

For freelancers, contractors, drivers and sole owners (Schedule C). Use one worksheet for each business. Enter yearly totals.

Your business

Business name, or your name

What the business does

EIN, if you have one

Date started

Tax year

Income

Form 1099-NEC	$	Form 1099-K	$
Form 1099-MISC	$	Income not on a form, including cash	$
Refunds you gave customers	$	Other income	$
Total income			$

Expenses

Business expenses only. Leave a line blank if it does not apply.

Advertising and marketing	$	Bank and card processing fees	$
Commissions and platform fees	$	Contract labor	$
Continuing education and training	$	Dues and professional memberships	$
Insurance (business)	$	Interest on business loans	$
Legal and professional fees	$	Licenses, permits and exam fees	$
Meals with clients (50% counts)	$	Office expenses	$
Pension and profit-sharing plans	$	Rent: office or workspace	$
Rent: equipment	$	Repairs and maintenance	$
Shipping and postage	$	Software and subscriptions	$
Supplies	$	Taxes (business)	$
Telephone (business share)	$	Internet (business share)	$
Tools, parts and small equipment	$	Travel: fares and lodging	$
Uniforms and work clothing	$	Wages paid to employees	$
	$		$

Equipment you bought

Items meant to last more than a year, such as a computer, a phone, machinery or furniture.

Item	Date bought	Cost	Business use %

Vehicle

A mileage log is required. Commuting between home and a regular workplace does not count.

Year, make and model

Date first used for business

Total miles this year

Business miles Jan 1 to Jun 30

Business miles Jul 1 to Dec 31

Gasoline	$	Parking	$
Tolls and E-ZPass	$	DMV registration and fees	$
Insurance (vehicle)	$	Repairs, tires and oil	$

Rideshare and delivery drivers

Copy these from the annual tax summary in your driver app.

Service or platform fees (Uber, Lyft)	$	Booking fees	$
Airport and city fees	$	Third-party fees	$
Tolls charged in the app	$	Phone mount, chargers, supplies	$

Do you use part of your home only for this business? (Ask for the Home office worksheet.) ☐ Yes ☐ No

Did you pay any person or company for services to your business? ☐ Yes ☐ No

Did you make estimated tax payments this year? ☐ Yes ☐ No

Totals

Total expenses	$	Net profit or loss	$

> Books behind? We can catch up your bookkeeping and set up a simple system for next year. Bookkeeping is billed separately from your tax return.

I confirm that the information on this worksheet is complete and correct to the best of my knowledge, and that I have records to support it. I understand that my preparer relies on what I provide and may ask reasonable questions about it, and that if the IRS or a state examines my return, it is my responsibility to produce those records.

Signature

Printed name

Date