

Business Name: \_\_\_\_\_

**Business Worksheet**

**1099 Forms:**

Did you pay \$600 or more to a service provider, contractor, or for rent? .....  
 Did you send them a Form 1099-MISC? If yes, provide copies.....

Yes	No
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

**Sales & Income:**

Total sales or income collected (Include all 1099-MISC & 1099-K)..... \$ \_\_\_\_\_  
 Cash Refunds & Discounts Paid to Customers..... \$ \_\_\_\_\_

**Cost of Goods Sold:**

Beginning Inventory (at your cost)..... \$ \_\_\_\_\_  
 Purchases..... \$ \_\_\_\_\_  
 Ending Inventory (at your cost)..... \$ \_\_\_\_\_

**Expenses:**

Advertising..... \$ \_\_\_\_\_  
 Commissions paid to other people (send them a Form 1099-Misc if \$600 or more)..... \$ \_\_\_\_\_  
 Subcontractors (send them a Form 1099-Misc if \$600 or more)..... \$ \_\_\_\_\_  
 Business or Liability Insurance (not personal health or accident insurance)..... \$ \_\_\_\_\_  
 Interest paid on Business Loans (must be 100% for business or business credit cards)..... \$ \_\_\_\_\_  
 Legal/Professional fees (include accounting and tax prep)..... \$ \_\_\_\_\_  
 Office Supplies..... \$ \_\_\_\_\_  
 Rent for Separate Office or Storage space (send them a Form 1099-Misc if \$600 or more)..... \$ \_\_\_\_\_  
 Repairs and Maintenance for Equipment..... \$ \_\_\_\_\_  
 Supplies..... \$ \_\_\_\_\_  
 Payroll Taxes (employer portion of FICA, FUTA, SUI & Pension or 401(k))..... \$ \_\_\_\_\_  
 Workers' Compensation..... \$ \_\_\_\_\_  
 Licenses and Permits..... \$ \_\_\_\_\_  
 Travel & Lodging (excluding meals)..... \$ \_\_\_\_\_  
 Meals (**Do Not include Entertainment**)..... \$ \_\_\_\_\_  
 Utilities for separate Offices or Storage (must be a separate structure from your home)..... \$ \_\_\_\_\_  
 Wages (include the employees' withholding taxes)..... \$ \_\_\_\_\_  
 Bank Charges (for business only checking account)..... \$ \_\_\_\_\_  
 Cell Phone..... Total Expense \$ \_\_\_\_\_ x Business Use % \_\_\_\_\_ = \$ \_\_\_\_\_  
 Second phone at Home or Office for Business and/or Fax ..... \$ \_\_\_\_\_  
 Postage & Delivery..... \$ \_\_\_\_\_  
 Dues & Subscriptions..... \$ \_\_\_\_\_  
 Gifts and Promotional Items ..... \$ \_\_\_\_\_  
 Internet Service, excluding phone and cable... Total Expense \$ \_\_\_\_\_ x Business Use % \_\_\_\_\_ = \$ \_\_\_\_\_  
 - (Not already claimed on the Home Office Worksheet)  
 Merchant Fees/Credit card processing fees..... \$ \_\_\_\_\_  
 Outside Services..... \$ \_\_\_\_\_  
 Parking & Tolls..... \$ \_\_\_\_\_  
 Outside Services ..... \$ \_\_\_\_\_  
 Uniforms (do not include street clothes)..... \$ \_\_\_\_\_  
 Continuing Education..... \$ \_\_\_\_\_  
 Amounts paid for Health Insurance set up under your business (not Business or Liability)..... \$ \_\_\_\_\_

Vehicle expenses? If yes, fill out a [Vehicle Worksheet](#) for each vehicle used.

Items not listed above (*Description, date purchased and cost*):

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Equipment and Computers > \$2500 (*Provide a fully detailed description, purchase date and purchase amount for each asset*)

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I certify that the above information is true and correct, **and** I have the documentation supporting my responses.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date