

Client Name: _____ Business Name: _____

Business Address: _____ Year of Expenses: _____

Direct Sales Business Worksheet

	Yes	No
1099 Forms:		
Did you pay \$600 or more to a service provider or contractor?	<input type="checkbox"/>	<input type="checkbox"/>
Did you send them a Form 1099-NEC or 1099-MISC? If yes , provide copies.....	<input type="checkbox"/>	<input type="checkbox"/>
If not , do you need us to send the Form(s) 1099-NEC or 1099-MISC?	<input type="checkbox"/>	<input type="checkbox"/>
Income:		
Rebates, Bonuses & Commissions.....	\$	_____
Expenses:		
Weekly Seminars.....	\$	_____
Monthly Seminars.....	\$	_____
Leadership Seminars.....	\$	_____
Men's/Ladies' Seminars.....	\$	_____
Website Fees.....	\$	_____
Office Supplies.....	\$	_____
Weekly System (<i>Deduct seminar tickets</i>)	\$	_____
Tools (<i>to hand out to prospect</i>)	\$	_____
Legal/Professional fees (<i>include accounting and tax prep</i>)	\$	_____
Hotels (<i>do not include meals</i>)	\$	_____
Travel (<i>air, bus, rental vehicles & gas for rental vehicles</i>)	\$	_____
Meals (Do Not include Entertainment)	\$	_____
Bank Charges.....	\$	_____
Cell Phone..... Total Expense \$ _____ x Business Use % _____ =	\$	_____
Second Phone at Home for Business and/or Fax.....	\$	_____
Books for Personal Development.....	\$	_____
Promotional Items.....	\$	_____
Internet Service, excluding phone and cable Total Expense \$ _____ x Business Use % _____ =	\$	_____
Parking & Tolls.....	\$	_____
Postage for outgoing Mail.....	\$	_____
Rental Vehicle & Expenses.....	\$	_____
Other:		
_____	\$	_____
_____	\$	_____
Equipment & Computers (<i>Provide a fully detailed description including purchase date and amount for each asset</i>)		
_____	\$	_____
_____	\$	_____

Auto expenses? If yes, fill out an Auto Worksheet for each vehicle used:	<i>Auto Expense Worksheet - View</i>
Home office expenses? If yes, fill out a Home Office Worksheet for each office:	<i>Home Office Worksheet - View</i>

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

Signature & Date

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