

Business name:

Product / Service:

Address:

☐ Pay anyone over \$600 for services?
[If yes, contact your advisor IMMEDIATELY]

☐ Start or end this business in 2023?

INCOME

Total sales \$

Returns & refunds \$

INVENTORY / COST OF GOODS SOLD

Inventory: Beg. \$

\$

Purchases \$

Inventory: End \$

\$

Personal use \$

EXPENSE	AMOUNT
Accounting	
Advertising, marketing	
Bank charges	
Commissions	
Independent contractor	
Consulting	
Dues & subscriptions	
Tolls (limit: \$25 per client)	
Education & training	
Charitable	
Licenses	
Legal/professional fees	
Insurance	
Property	
Liability	
Work. comp.	

EXPENSE	AMOUNT
Office expenses (not rent)	
Rent	
Computer	
Software	
Salaries & wages	
Payroll expenses	
Pension, profit-sharing	
Parking: Fees & tolls	
Postage & shipping	
Printing	
Equip. rental or lease	
Repairs, upkeep	
Tools	
Supplies	
Uniforms	

EXPENSE	AMOUNT
Taxes	
Sales	
Payroll	
Heat, Elec.	
Utilities	
Water, Sewer	
Trash	
Internet: Business use only	
Meals & Entertainment	G
Airfare	
Travel	
Auto rental	J
Lodging	
Phone: Business use only	L
Other:	
Other:	
Other:	

Categories that may require issuing a 1099 for payments made to anyone for \$600 or more. Contact us immediately.

DO YOU HAVE VEHICLE MILEAGE OR EXPENSES TO REPORT? PROVIDE AMOUNTS IN THE VEHICLE USE SECTION OF PAGE 5.

EQUIPMENT PURCHASES, IMPROVEMENTS & REPLACEMENTS

Date	Description	Cost

SALES & DISPOSITIONS

Date	Description	Price

OFFICE IN THE HOME DEDUCTION

TO QUALIFY, THE AREA MUST HAVE REGULAR & EXCLUSIVE USE AS A HOME OFFICE



I have documentation to support the amounts provided.

Sq. Ft.

Repairs

Utilities

Insurance

Condo, MGMT fees

Other:

Office area ONLY

ENTER TOTALS IN THE BOXES BELOW

Home (total structure)