

**DONAHUE & ASSOCIATES** Self Employment Tax Organizer

Self Employed Business Income & Expenses			
Must keep different businesses separated and the businesses of each spouse separate	<input type="checkbox"/> You <input type="checkbox"/> Sp.	<input type="checkbox"/> You <input type="checkbox"/> Sp.	
Income: Gross Receipts or sales			
Returns and Refunds			
Other _____			
Other _____			
Cost of Inventory at Beginning of Year			
Cost of Merchandise Purchased			
Cost of Items for Personal Use			
Cost of Inventory at End of Year			
Advertising			
Bank Charges			
Car Expenses			
Commissions			
Dues and Publications			
Freight			
Health Insurance			
Insurance (not life)			
Interest: Mortgage Paid to Banks			
Other _____			
Legal and Professional Services			
Office Expenses			
Rent or Lease: Machinery/Equipment			
Rent or Lease: Other Business Property			
Repairs			
Supplies			
Taxes: Payroll (provide all payroll reports)			
Sales			
Property			
Other _____			
Travel			
Business Meals & Entertainment			
Gifts (Generally limit \$25 per person per year)			
Telephone			
Utilities			
Wages			
Other: Education & Seminars			
Equipment, Furniture, improvements (*list below)			
_____			
_____			
Check if Forms 1099 Filed		<input type="checkbox"/>	<input type="checkbox"/>
Check if Home Office		<input type="checkbox"/>	<input type="checkbox"/>
Check if Keogh or HR-10 Retirement plan		<input type="checkbox"/>	<input type="checkbox"/>
<b>*Equipment, Furniture, Improvements</b>			
Description	Date Acquired	Cost	

Automobile Expenses		
	Vehicle 1	Vehicle 2
Gasoline, Oil, Lubrication		
Repairs & Maintenance		
Tires, Batteries, etc.		
Insurance (don't duplicate)		
License & Taxes (don't duplicate)		
Interest (don't duplicate)		
Wash & Wax		
Lease Payments		
Other _____		

Business expense deductions must be based on a log and/or other receipts and records. The combination of records should document: the business purpose, date and time, place, and amount.

Business Mileage		
	Vehicle 1	Vehicle 2
Vehicle Description (make, model)		
Date Originally Purchased	/ /	/ /
Cost of Vehicle (year purchased)		
Parking		
Total Miles Driven This Year	mi	mi
Business Miles Driven		
For your employer	mi	mi
To professional meetings	mi	mi
Between 1 <sup>st</sup> and 2 <sup>nd</sup> job	mi	mi
From job to school	mi	mi
Job seeking	mi	mi
For investment and tax prep.	mi	mi
Rental activities	mi	mi
Self employed business	mi	mi
Temporary job site, or other:	mi	mi

Away From Home Expenses				
	Your Expenses Related to:		Spouse Expenses Related to:	
	Employment	Self Emp. Business	Employment	Self Emp. Business
Airfare, Train, Bus				
Auto Rental, Taxi, etc.				
Meals & Meal Tips				
Lodging				
Laundry				
Tips				
Other _____				

For business meals and entertainment, you must also document that (1) you discussed business during the meal, or (2) you had a substantial and bonafide business discussion or activity before or after the meal/entertainment, or (3) you ate alone while out of town. You must record the name and business relationship of each person entertained.

**Professional Business Expenses**

(Musician, Artist, Writer, Composer, Free Lance Artist)

Schedule A

Self Employed  
Schedule C

1. Union dues & initiation fees	\$ _____	\$ _____
2. Instrument repairs & supplies	\$ _____	\$ _____
3. Music, manuscript, paper supplies	\$ _____	\$ _____
4. Publicity, photos, flowers (opening night)	\$ _____	\$ _____
5. Tuxedo, concert attire, costumes, etc.	\$ _____	\$ _____
6. Laundry	\$ _____	\$ _____
7. Accompanists	\$ _____	\$ _____
8. Substitutes	\$ _____	\$ _____
9. Tapes, recordings	\$ _____	\$ _____
10. Agent/Management fees	\$ _____	\$ _____
11. Lessons	\$ _____	\$ _____
12. Books, publications, journals	\$ _____	\$ _____
13. Concert fees for study	\$ _____	\$ _____
14. Stage cosmetics	\$ _____	\$ _____
15. Demo tapes and recording fees	\$ _____	\$ _____
16. Gifts (\$25 or under each)	\$ _____	\$ _____
17. Entertainment	\$ _____	\$ _____
18. Meals (business discussed)	\$ _____	\$ _____
19. Travel expense (air, bus, taxi, etc.)	\$ _____	\$ _____
20. Meals and lodging (overnight only)	\$ _____	\$ _____
21. Recital expenses: Hall rental, or other:	\$ _____	\$ _____
22. Telephone: Basic: _____ long distance calls	\$ _____	\$ _____
23. Postage, mailing	\$ _____	\$ _____

Equipment:

Type:	Cost:
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____