

Bowie & Co.

3349 Melwood Ave
Pittsburgh, PA 15219

kjbowie.com | 412 501 3114
info@kjbowie.com

Self-Employed Worksheet

Self Employment — Schedule C

Use this worksheet if you have earned self employment income or received a 1099. This is an additional worksheet to the general Tax Return Interview Worksheet. If you've yet to complete that first one, please do so. You can find it at kjbowie.com/resources.php. Note: the IRS requires all reported information you state below to be backed-up by written, printed, or digital proof (i.e.: receipts, reports, or bills).

Legal Name (first, MI, last): _____

Business Name (if other than legal name): _____

What you do in this business: _____

EIN (if any): _____ - _____ NAICS: _____

Business Address (if different from home): _____

City: _____ State: _____ Zipcode: _____

Is this an LLC? yes no PA Rev ID: 1000 _____

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INCOME

Gross receipts, money received, sales, services, grants, etc.: \$ _____

(Total amount should include amounts received on 1099s + payments from customers. Do not include amounts on W-2's)

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EXPENSES

Advertising, marketing, promotions (e.g.: biz cards, website, promo events): \$ _____

Health Insurance: \$ _____ Business-related Insurance: \$ _____

Interest (e.g.: loan or credit card): \$ _____

Legal, accounting, or professional fees: \$ _____

Office expenses: \$ _____ Repairs and maintenance: \$ _____

Rent: (do NOT include home office rent here): \$ _____

Vehicle/equipment rental: \$ _____

Supplies: \$ _____ Taxes and licenses: \$ _____

Travel (e.g.: hotels, airfare, car rental): \$ _____

Meals and entertainment (in relation to biz/client development, travel): \$ _____

Utilities (do NOT include home office utilities here): \$ _____

Telephone and internet: total \$ _____ x BUSINESS USE _____ % = _____

Bank service charges: \$ _____ Software: \$ _____

Dues and subscriptions: \$ _____

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Small tools and equipment: \$ _____

Subcontractors: \$ _____

+ If you've paid any one person \geq \$600 in 2016, you are required to send them a 1099

Did you send any 1099s? yes no

Parking: \$ _____ Postage and delivery: \$ _____

Books and research: \$ _____ Continuing education: \$ _____

Job Materials: \$ _____ Merchant Fees: \$ _____

Other (specify): _____ = \$ _____

Other (specify): _____ = \$ _____

Other (specify): _____ = \$ _____

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Value of Inventory at 12/31/16 (if applicable): _____

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LARGE PURCHASES (ASSETS)

Any large purchase is one that is **greater than \$1,000 and has a life span beyond a single year**. This includes, but not limited to, property, large renovations, repairs, and appliances.

Item	Date of Purchase	Biz %	Cost
<input type="checkbox"/> _____	_____	____%	\$ _____
<input type="checkbox"/> _____	_____	____%	\$ _____

.....

VEHICLE / MILEAGE METHOD

Business miles: _____

Date the vehicle was placed into business use: _____

Is this vehicle dedicated to business use only? Yes No

Is there another vehicle in your household? Yes No

OR:

VEHICLE / ACTUAL EXPENSE METHOD *(You don't have to record these if using mileage method)*

Business miles: _____ Personal miles: _____

Vehicle purchase price: \$ _____ Date of purchase/biz use: _____

Vehicle description/name: _____

Repairs and maintenance: \$ _____ Registration & licenses: \$ _____

Gas and oil: \$ _____ Insurance: \$ _____

Tires: \$ _____ Tolls: \$ _____

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HOME OFFICE / BUSINESS USE OF HOME

If you use a portion of your home as a studio or office, please complete the following. Note: the space in which you state as "business use" must specifically be for office use and nothing else. This space can include storage of business-related items, records, and so on, as well.

Business use: _____ sq ft

Total home: _____ sq ft (do not include unfinished space, i.e., raw attic or basement)

Rent (total for 2016): \$ _____ OR Mortgage interest: \$ _____

Real estate taxes: \$ _____

Insurance: \$ _____

Repairs and maintenance (whole home): \$ _____

Repairs and maintenance (office specific): \$ _____

Utilities (total for 2016 gas, water, electric): \$ _____

Other (specify): _____ = \$ _____

Other (specify): _____ = \$ _____

Large repairs, purchases, assets / Place an X in "Office" column if specifically for office.

Item	Date of Purchase	Office	Cost
<input type="checkbox"/> _____	_____	_____	\$ _____
<input type="checkbox"/> _____	_____	_____	\$ _____
<input type="checkbox"/> _____	_____	_____	\$ _____

Home Depreciation / Square footage section above must be completed!

Purchase total: \$ _____

Date of purchase: _____

DON'T FORGET / ☂ If you sell physical goods within and to persons or places in PA, you should be collecting, reporting and remitting sales tax.

☂ If you net income from this business is over \$12,000 (annually), you may need to register with the city to pay the Pittsburgh Local Services Tax (LS-1) and Expense Tax (ET-1).

NOTES / Here, have some more lines:
