

Tax Associates

Self-Employment Questionnaire

How to use this form

Fill out the following pages using this guide. Page 2 details your profit and loss (P&L) for your schedule C business. Page 3 is where you'll enter information about vehicles used by your business. If you are unsure about any entry, please feel free to ask your tax preparer about how to classify expenses:

- **Gross Income** – All income received by your business, including late fees and reimbursement for utilities such as gas, electricity, internet, or water.
- **Advertising** – All advertising expenses.
- **Commissions and Fees** – Commissions and fees not capitalized during purchase of property.
- **Depletion** – Depletion of resources such as timber in certain businesses
- **Contract Labor** – Labor expense for non-W2/non-wage labor
- **Employee Benefits** – Your contribution to employee benefits such as health insurance and group-term life insurance.
- **Insurance** – Business insurance and other non-health-related insurance.
- **Mortgage Interest** – Interest paid on mortgages for business property.
- **Business Interest** – Interest paid on business loans.
- **Legal and Professional Fees** – Fees paid to lawyers, government agencies, and professionals for professional services.
- **Office Expenses** – Office supplies and postage expenses.
- **Pension and Profit Sharing** – Your contribution to employee profit-sharing, pension plans, etc.
- **Rented/Leased Vehicles/Machinery** – The business portion of any vehicle rental, machinery, and equipment expenses.
- **Property Lease/Rent** – Rent and lease expenses for other property such as office space.
- **Repairs/Maintenance** – Repairs and maintenance expenses for business property and equipment.
- **Supplies** – Supplies used by your business. See Note 1.
- **Taxes and Licenses** – Taxes paid to government agencies and amounts paid for licensing.

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- **Travel** – Travel expenses directly related to doing business, including conference attendance.
- **Deductible Meals** – Meal expense. See Note 2.
- **Utilities** – Utilities such as gas, electricity, water, etc. used for your trade or business.
- **Wages** – Wages paid to employees.
- **Other Expenses** – Other expenses incurred by your business.

Note 1. Supplies include any supplies purchased for use in your business that generally have a useful lifetime of less than one year and do not directly contribute to the manufacture of a product.

Note 2. Meals can generally only be deducted when all of the following are satisfied: 1) you are traveling for work; 2) meals are with clients, customers, or vendors; 3) and the expense is not considered lavish or extravagant under the circumstances. You may deduct 50% of your meals (or 80% if you are subject to DOT hours of service limits).

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Basic Info

Business Name	Industry	Product
Street Address	Unit # (optional)	
City	State	Postal Code

Gross Income:	\$ _____	Vehicle/Machinery	
Advertising:	\$ _____	Lease/Rentals:	\$ _____
Commissions/Fees:	\$ _____	Property	
Depletion:	\$ _____	Lease/Rental:	\$ _____
Contract Labor:	\$ _____	Repairs/Maintenance:	\$ _____
Employee Benefits:	\$ _____	Supplies:	\$ _____
Business Insurance:	\$ _____	Taxes/Licenses:	\$ _____
Mortgage Interest:	\$ _____	Travel:	\$ _____
Legal/Professional		Deductible meals:	\$ _____
Fees:	\$ _____	Utilities:	\$ _____
Office Expenses:	\$ _____	Wages:	\$ _____
Pension/Profit		Other Expenses:	\$ _____
Sharing:	\$ _____		

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Vehicle Information

If you used a vehicle for managing your business, report the type of vehicle and the mileage or expenses.

For **date put into service**, only provide this for newly purchased properties or when a vehicle is newly used in 2023.

Vehicle Description (make, model, etc.): _____

Date put into service: _____ (MM/DD/YYYY)

☐ I want to claim mileage

Total # of miles used for business purposes: _____ miles

Total # of miles used for commuting: _____ miles

Total # of miles used for other purposes: _____ miles

☐ I do NOT want to claim mileage and instead want to claim actual expenses.

Gas: \$ _____ **Auto Insurance:** \$ _____

Repairs: \$ _____ **Parking Fees/Tolls:** \$ _____

Maintenance: \$ _____ **Other Expenses:** \$ _____

☐ This vehicle was available for personal use during off-duty hours.

☐ I am at least 5% owner of this vehicle.

☐ I have another vehicle available for personal use.

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Home Office Deduction Information

☐ I want to claim a home office deduction using the **simplified method**.

With the simplified method, you simply need to know the **total square footage of your home** and the square footage of areas **exclusively used for your business**. The deduction is \$5 per square foot up to a maximum of 300 square feet (or \$1500).

Total square footage of your house: _____ sq. ft.

Home office square footage: _____ sq. ft.

☐ I want to claim a home office deduction using actual expenses.

With the regular method, you must track all expenses related to your home office and keep records.

Note that if your business losses (including home office deduction) exceed your business income, you can **carry over** these losses to next year. However, you may also have to pay back tax savings from depreciation when you sell your home in the future.

% of home (by sq. ft) used for business: _____%

If you own your home, fair market value of home when you started business: \$_____

If you lease your home/apartment/etc., total rent payments in 2023: \$_____

Business Expenses

Internet: \$_____ % business use: _____%

Utilities: \$_____ % business use: _____%

Repairs¹: \$_____ % business use: _____%

Upgrades²: \$_____ % business use: _____%

Utilities: \$_____ % business use: _____%

Other: \$_____ % business use: _____%

¹**Repairs** include any work done to your home prorated by the percentage business use. For example, if you repair a whole-house HVAC system, the business use % is the % of square footage of your home used exclusively for business. If you repaired an item exclusively used by the business in the home, your business use is 100%.

²**Upgrades** can include any upgrades done to your house meant to be utilized by your business (for example, if you installed new lighting to support a photography business) that is attached to the house and can be considered part of the house.