



146 West Boylston Drive, Suite 302
 Worcester, MA 01606
 (508)365-6522

119 Merriam Avenue, 2nd Floor
 Leominster, MA 01453
 (by appointment only)

Schedule C– Self-Employment/Business Worksheet

Please use this worksheet to gather information on self-employment/business expenses.

BUSINESS INFORMATION

Business Name: _____

Address: _____

Federal ID # _____

Is this your first year in business? YES NO

Total Gross Business Income \$ _____

Total Other Income \$ _____

Cost of Goods Sold:

Beginning Inventory	\$ _____
Merchandise Purchased for Resale	\$ _____
Cost of Labor	\$ _____
Materials & Supplies	\$ _____
Other Direct Sales Costs	\$ _____
Ending Inventory	\$ _____

Expenses:

Advertising	\$ _____	Repairs and Maintenance	\$ _____
Commissions	\$ _____	Supplies (not included above)	\$ _____
Contract Labor *	\$ _____	Real Estate Taxes (paid for business)	\$ _____
Employee Benefits	\$ _____	Other Taxes (Payroll and other)	\$ _____
Insurance (other than health)	\$ _____	Travel (do not include meals)	\$ _____
Health Insurance (for you)	\$ _____	Meals and Entertainment	\$ _____
Health Insurance (for your employees)	\$ _____	Utilities	\$ _____
Mortgage Interest (if paid for business)	\$ _____	Wages (W-2's issued)	\$ _____
Other Interest Paid	\$ _____	Bank and Credit Card Charges	\$ _____
Office Expenses	\$ _____	Tools	\$ _____
Postage & Delivery	\$ _____	Uniforms...logo YES or NO	\$ _____
Professional Fees	\$ _____	License/Dues	\$ _____
Rent on Business Property	\$ _____	Telephone (for business)	\$ _____
Equipment Rentals	\$ _____	Other Expenses (attach schedule)	\$ _____
Business Mileage	_____	<i>Do not include mileage to/from your home unless your office is in your home.</i>	

Do you have written records to support your mileage? YES NO

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Spinelli CPA, PC > 146 West Boylston Drive, Suite 302 > Worcester, MA 01606 > www.spinellipcpa.com

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Members of AICPA and MSCPA

Did you receive a Payroll Protection Plan (PPP) Loan? YES NO

If yes have you applied for forgiveness and /or received forgiveness yet? YES NO

Please provide documentation of the loan and the forgiveness.

Did you receive any other grants or loans, such as Economic Injury Disaster Loan (EIDL)? If yes, please provide information?

Did you make contributions to a business pension plan? YES NO

If yes, how much and what type of plan? _____

Did you purchase any major pieces of equipment? YES NO If yes, please list.

New Equipment	Date of Purchase	Purchase Price

Do you have an office in your home? YES NO If yes, provide additional information below:

Square Footage of Office _____

Square Footage of Home _____

Real Estate Taxes _____

Mortgage Interest/Rent Pd. _____

Homeowner's Insurance _____

Utilities _____

Repairs and Maintenance _____

Have you prepared (or will you prepare) all required Forms 1099? * _____

**Please note - if you have paid more than \$600.00 to a contractor, you may be required to file a 1099-NEC with the IRS before the January 31 deadline. Late filing penalties are \$50.00 per late 1099. Please contact us if you need help in preparing these forms.*

I certify that I have listed all income and expenses; I have documentation to prove the figures entered on this worksheet.

Printed Name: _____ Date: _____

Signature: _____ Tax Year _____

Thank you for choosing Spinelli CPA, PC as your tax advisor. We value your business and are looking forward to working with you.

Sincerely,

Karen Spinelli, CPA
President
Spinelli CPA, PC