

RG & ASSOCIATES

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Business Income and Expense Worksheet

Important Note: This worksheet is for individuals who are self-employed. Please fill out this form to the best of your ability. We want to stress the importance of having accurate income and expenses for backup in case of an examination or audit. We do not need any receipts. This form will extremely help facilitate in the preparation of your return and allow us to assist you more in your tax planning. Thank you for your cooperation.

Tax Year 20____

INCOME:

Sales: _____

Commission: _____

Other: _____

Company Name

EXPENSES:

Advertising: _____

Business Insurance: _____

Legal/Prof. Fees: _____

Mortgage: _____

Rent (building): _____

Rental Equipment: _____

Office Supplies: _____

Office Expense: _____

Equipment: _____

Inventory: _____

Repairs/Maintenance: _____

Licenses/Fees: _____

Taxes: _____

Business Travel: _____

Meals (office/clients): _____

Utilities: _____

Wages (employees): _____

Contract Labor: _____

Business Telephone: _____

Cell Phone: _____

Internet: _____

Postage/FedEx/UPS: _____

Other: _____

Other: _____

Other: _____

Other: _____

AUTO EXPENSE (Miles driven OR actual expenses):

We will deduct the higher of the two. If you do not have actual expenses, please provide mileage only!

Miles driven: _____

OR Actual Expense:

Gas Receipts: _____

Auto Repairs: _____

New Vehicle: _____