

2023 Client Tax *Organizers*
Schedule C Proprietorship
With Form 8829 "Home Office" & Business Vehicle Use

Biz Name _____ **Tel #** _____ (Home)
Biz Address _____ **Tel #** _____ (Work)
City, State, Zip _____ **e-mail** _____

Please complete if any of the above apply or have changed:

Gross Income \$ _____ (enclose copies of all 1099-MISC)

Expenses

Advertising	\$ _____	Travel	\$ _____
Insurance [liability]	\$ _____	Meals & Ent.	\$ _____
Interest (biz loans)	\$ _____	Misc.	\$ _____
Bank Fees	\$ _____	Biz Utilities	\$ _____
Legal Expenses	\$ _____	Biz Telephone	\$ _____
Tax & Accounting	\$ _____	Cellular	\$ _____
Office Expense	\$ _____	Internet	\$ _____
Computer Expense	\$ _____	Wages paid [W-2]	_____
Postage & Shipping	\$ _____	Subcontract Pd	\$ _____
Rent [building]	\$ _____	Safety Clothing	\$ _____
Rent [equipment]	\$ _____	Tools (expendable)	\$ _____
Repairs	\$ _____	Education (job)	\$ _____
Supplies [general]	\$ _____	Off-Road Fuel	\$ _____
Materials [on jobs]	\$ _____	Type _____ Gal _____	_____
Taxes (sales, etc)	\$ _____	_____	\$ _____
Licenses	\$ _____	_____	\$ _____
<i>Inventory, yr start</i>	\$ _____	<i>Equip Losses/Sale (list details)</i>	
<i>Inventory, yr end</i>	\$ _____	<i>Assets Purchased (On a separate</i>	

Sheet list details with description, date & cost of each. Don't include assets from previous years.)

Home Office & Storage (Form 8829), if applicable

Square footage	_____	Heat (entire hse)	\$ _____
Sq-ft entire home	_____	Electric " "	\$ _____
Cost of home	\$ _____	Insurance	\$ _____
Cost of land	\$ _____	Repairs/Upkeep	\$ _____
First year used for business	_____	Property Taxes	\$ _____
Mortgage Interest	\$ _____	Home rent, if appl.	\$ _____

Business mileage rate: Jan 1st- Dec 31st @ .65.5/cents per mile

Brief Description	_____	Business Miles *	_____	Written?	<input type="checkbox"/> Y
Original Cost	_____	Total miles for year	_____		
Year first used for business	_____	Tolls & Parking	_____		

*Mileage is generally the best method. Dump trucks & heavy duty trucks are best expensed.

Other Business vehicles: info as above (5 max) or any may be expensed & depreciated. If so, list cost of gasoline, oil, repairs, tires, registration, excise tax, insurance, etc.

Mail to Taxing Situations, Inc., 515 Cobbs Bridge Road, New Gloucester, ME 04260-9325
FAX to (207) 657-8145 or scan & attach as an e-mail to Shannon@TaxingSituations.com