

2023 SELF-EMPLOYED & BUSINESS ORGANIZER

YOUR NAME _____

DESCRIBE YOUR PRODUCT OR SERVICE _____

BUSINESS NAME _____

IMPORTANT NOTE: AMOUNTS ENTERED HERE SHOULD NOT BE LISTED ON ANY OTHER ORGANIZER!

Have you reviewed the depreciation schedule included in last year's tax return to be sure you still own the assets shown on it? **YES NO**

Did you make any payments for which you are required to file Form 1099? **YES NO**

GROSS RECEIPTS/SALES FOR YEAR

INCOME \$ _____

(SEND DETAILS IF INCOME IS FROM MORE THAN ONE SOURCE) Do NOT include your W-2 wage income, partnership income, sales tax collected, interest income, or sales of used equipment. Wage income: send Form W-2. Interest income: send Form 1099. Partnership: send K-1. Sales of used equipment: Send SALE ORGANIZER.

BWC REFUNDS RECEIVED \$ _____ IS THIS AMOUNT INCLUDED IN INCOME ABOVE? **YES NO**

If you have enclosed any Forms 1099-NEC or MISC, is the income included in your sales amount above (circle one)? **YES NO**

COST OF GOODS SOLD Beginning inventory (on hand January 1 at YOUR cost, NOT retail value) \$ _____

Cost of merchandise purchased for resale (less personal use) \$ _____

Cost of materials/supplies for construction or manufacturing businesses \$ _____

Cost of non-employee labor/subcontract/sublet \$ _____

Ending inventory (unsold on December 31, if included above, at YOUR cost, NOT retail value) \$ _____

OPERATING EXPENSES (Do not enter car, pickup, or home office expenses here. See reverse.)

_____ Advertising & promotional expense _____ Phone, business line *Circle one* CELL LANDLINE

SEE REVERSE _____ Car and pickup expenses _____ Phone, other line *Circle one* CELL LANDLINE

_____ Local transportation & taxi _____ Electricity/fuel at business location
(not home office)

_____ Employee benefit program _____ Heat at business location
(include occasional meals, picnics, small gifts) (not home office)

_____ Insurance for business _____ Wages for employees (on payroll)
(not house, car, pickup)

_____ Health insurance or sharing ministry _____ Bank service charges, fees
for you and your family

_____ Mortgage interest for business _____ Laundry and cleaning
(must enclose Form 1098)

_____ Other interest paid (send detail) _____ Meals for **overnight** business trips only

_____ Accounting, tax return filing _____ Travel tickets for business trips (air, etc.)

_____ Office supplies and expenses _____ Hotels/lodging for business trips

_____ Rent for equipment _____ Days gone on overnight business trips

_____ Rent for business building _____ Other (describe _____)

_____ Repairs, building and equipment _____ Other (describe _____)
(not car/pickup)

_____ Supplies (include tools under \$2,500; _____ Other (describe _____)
Tools over \$2,500 report on Purchase Organizer)

_____ Real estate tax for business property _____ Other (describe _____)

_____ Ohio Commercial Activity Tax (CAT) _____ Other (describe _____)

_____ Payroll taxes _____ Other (describe _____)

_____ Other taxes and licenses (Do not include income tax or sales tax)

2023 BUSINESS USE OF CAR/PICKUP/HOME

AMOUNTS ENTERED HERE SHOULD NOT BE LISTED ON ANY OTHER ORGANIZER!

IMPORTANT NOTES:

- **MILEAGE, DATE-OF-PURCHASE, AND INTEREST INFORMATION ARE NEEDED FOR ALL VEHICLES WITH BUSINESS USE.**
- OPERATING EXPENSE AND PURCHASE PRICE ARE NEEDED **ONLY** FOR VEHICLES FOR WHICH YOUR DEDUCTION WILL BE CALCULATED USING THE ACTUAL-EXPENSE METHOD.

VEHICLE #1

Year/make/model _____ GVW _____ POUNDS

Date of purchase/lease _____ (required) IF SOLD, DATE _____ \$ _____

Total purchase/lease price _____ (include sales tax) WAS VEHICLE TRADED IN? YES NO

Business mileage _____ (required)

Personal mileage _____ (required) END ODOMETER _____

2023 **TOTAL MILEAGE** _____ miles BEG ODOMETER _____

Operating expenses, including fuel, oil, repairs, tires, insurance, license \$ _____ If leased, total payments made in 2023 \$ _____

Interest paid on loan \$ _____ (required for all business use vehicles)

VEHICLE #2

Year/make/model _____ GVW _____ POUNDS

Date of purchase/lease _____ (required) IF SOLD, DATE _____ \$ _____

Total purchase/lease price _____ (include sales tax) WAS VEHICLE TRADED IN? YES NO

Business mileage _____ (required)

Personal mileage _____ (required) END ODOMETER _____

2023 **TOTAL MILEAGE** _____ miles BEG ODOMETER _____

Operating expenses, including fuel, oil, repairs, tires, insurance, license \$ _____ If leased, total payments made in 2023 \$ _____

Interest paid on loan \$ _____ (required for all business use vehicles)

HOME OFFICE DEDUCTION (All of the following information must be furnished to compute the deduction.)

Is office area used regularly and exclusively for business? _____ Yes _____ No

Is this the only space available for office duties? _____ Yes _____ No

IF THE ANSWER TO EITHER QUESTION IS "NO," THE HOME OFFICE DEDUCTION IS NOT ALLOWED.

Total \$\$\$ invested in home & lot \$ _____ Cost of land (include in total at left) \$ _____

Square feet of the home office area _____ sq. ft. Date of occupancy _____

Total sq. feet of heated area of home _____ sq. ft. Rent pd for the year \$ _____

Real estate tax \$ _____ Electric \$ _____ Trash \$ _____

Mortgage interest \$ _____ Heat \$ _____ Repairs \$ _____

Insurance \$ _____ Water \$ _____ Clnng, mtn \$ _____

Lawn care \$ _____