

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: _____

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: _____