

calculate basic

♥ This form helps you calculate the basic numbers you'll need to file your federal tax return. There are some additional calculations, but they are typically done when filing by the software, the person helping you, or worksheets. If you are using TurboTax, H&R Block, a tax preparer, or accountant, then this is all you need. ♥ If you're using Paper Forms or want to do the math to predict some of your taxes, use the **Calculate Complete** form in addition to this form.

Income

does NOT include
sales tax collected

Gross Sales - reported on 1099-MISCs

\$

Gross Sales - reported on 1099-Ks

\$

Gross Sales - all other (including barter)

\$

Gross Income Total

\$

Expenses*

Advertising	website, business cards, flyers, design fees
Car and Truck	mileage or actual costs, parking fees, ferry, tolls
Commissions and Fees	official ones, e.g. broker fees
Contract Labor	independent contractors who not professionals
Depreciation and Section 179	items, tools that cost over \$100
Insurance	professional insurance, general liability
Interest	credit card for biz expenses, business loans
Legal and Professional	lawyers, accountants, anyone requiring prof. license
Office expense	paper, ink, folders, notebooks, postage
Rent or Lease	for office, equipment
Repairs and Maintenance	computers, tools, equipment
Supplies	stuff you need for your service or products and books, magazines, professional dues
Taxes and Licenses	business licenses, B+O tax
Travel	airfare, lodging, meals during travel
Meals (Half of \$_____)	meals + entertainment in town
Utilities	cell phone, Dropbox, wi-fi, percentage of home utilities (if applicable)
Other - Bank Fees	fees from banks, credit cards, PayPal, Stripe, etc.
Other - Prof. Development	classes, consulting, conferences, retreats, webinars
Other - _____	

\$

\$

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\$

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\$

Total Expenses

\$

Home Office

Simplified Option

Multiply square footage _____ x \$5 =

\$

Mileage

Grand Total-All Miles

Commuting Total

Personal Total

Business Total

Estimated Qtrly

Tax Payments

\$

\$

\$

\$

Reward!



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*Four categories are removed from this form: Depletion, Employee Benefit Programs, Pension + Profit Sharing, Wages

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