

GREGG KATZ / BUSINESS INCOME TAX RETURN INTAKE **FILLABLE FORM**
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IAMGREGGKATZ@GMAIL.COM / 913-280-3266

If you are an **independent contractor, freelancer, sole proprietor, or a single-member LLC**, the IRS treats these the **same for federal tax filing purposes**.

- All are reported on **Schedule C (Profit or Loss From Business)**
- Income and expenses flow through your **personal tax return (Form 1040)**
- The business does **not** file a separate federal income tax return
- The IRS looks at **what you do**, not what you call the business
- You may use an **SSN or EIN**, depending on your setup

Note: A single-member LLC is disregarded for federal tax purposes unless you elected S-Corp or C-Corp taxation.

Business Identity & Registration

- Business name (if different from legal name): _____
- Operating as: Independent Contractor Sole Proprietor Single-Member LLC
- DBA / Trade name (if any): _____
- Uses an EIN for business? Yes No EIN: _____
- Uses SSN instead of EIN for tax reporting
- EIN used for (check all): 1099s issued Payroll Bank account State registrations
- Accounting method used: Cash Accrual Not sure

Schedule C — Income Review (Totals Needed)

- 1099-NEC income — Total: \$ _____
- 1099-K income — Total: \$ _____
- 1099-MISC (business income) — Total: \$ _____
- Platform income (Uber, Amazon Flex, DoorDash, Etsy, etc.) — Total: \$ _____
- Cash payments received — Estimated total: \$ _____
- Zelle / Venmo / Cash App / PayPal (business only) — Total: \$ _____
- Checks deposited for business — Total: \$ _____
- Tips or gratuities — Total: \$ _____
- Barter or trade income — Estimated value: \$ _____
- Refunds from vendors or suppliers — Total: \$ _____
- Bonuses, incentives, or prizes related to work — Total: \$ _____
- Cancelled business debt (1099-C) — Amount: \$ _____
- State or local grants — Amount: \$ _____
- Other business income not reported on forms — Total: \$ _____
- Sales tax collected from customers (not income) — Amount: \$ _____

Cost of Goods Sold (If You Sell Products)

- Inventory at beginning of year — Value: \$ _____
- Purchases of products or materials — Total: \$ _____
- Cost of labor directly tied to production — Total: \$ _____
- Other production costs — Total: \$ _____
- Inventory at end of year — Value: \$ _____

Do you track inventory? Yes No

Vehicle & Travel Expenses (Totals Needed)

- Total mileage — Total miles: _____
- Business mileage — Total miles: _____
- Personal mileage — Total miles: _____
- Fuel — Total: \$ _____
- Oil changes & routine maintenance — Total: \$ _____
- Repairs — Total: \$ _____
- Registration & inspection fees — Total: \$ _____
- Vehicle insurance (business portion) — Total: \$ _____
- Parking & tolls — Total: \$ _____
- Business travel (airfare, lodging, transportation) — Total: \$ _____
- Meals while working — Total: \$ _____
- Vehicle used: Personal Business-only Multiple vehicles
- Make, model and year of vehicle — _____

Office, Tech & Operating Expenses

- Cell phone (business portion) — Total: \$ _____
- Internet service (business portion) — Total: \$ _____
- Computer / tablet — Total: \$ _____
- Printer & peripherals — Total: \$ _____
- Software & subscriptions — Total: \$ _____
- Office supplies — Total: \$ _____
- Printing & postage — Total: \$ _____

Website, Online Services & Advertising (Commonly Missed)

- Website hosting — Total: \$ _____
- Domain registration — Total: \$ _____
- Website builder or maintenance (Wix, Squarespace, WordPress, etc.) — Total: \$ _____
- Email services (Google Workspace, Outlook, etc.) — Total: \$ _____
- Cloud storage / backups — Total: \$ _____
- Google Ads — Total: \$ _____
- Facebook / Instagram ads — Total: \$ _____
- Other online ads or boosted posts — Total: \$ _____
- Yelp or directory ads — Total: \$ _____
- Business cards & printed marketing — Total: \$ _____
- Referral or lead-generation fees — Total: \$ _____

Contract Labor & Payments to Others

- Contract labor / subcontractors paid — Total: \$ _____
- Number of contractors paid: _____
- Paid any one person \$600 or more? Yes No

For each contractor paid \$600+:

- Name: _____
- Address: _____
- SSN or EIN: _____
- Amount paid: \$ _____

- W-9s collected Yes No
 1099-NECs issued Yes No Not sure

What Counts as Contract Labor?

Payments to non-employees for services, such as:

- Bookkeepers, VAs, consultants
- Web designers, IT support
- Marketing or social media managers
- Independent helpers or drivers
- Cleaning, repair, or maintenance services

If you paid **\$600 or more to any one contractor**, you are generally required to issue **Form 1099-NEC**, regardless of how they were paid.

Home Office (If Applicable)

- Area used **exclusively** for business
- Square footage of home office: _____ sq ft
- Rent or mortgage interest — Total: \$ _____
- Utilities — Total: \$ _____
- Property taxes — Total: \$ _____
- Homeowners or renters insurance — Total: \$ _____
- Repairs (direct/indirect) — Total: \$ _____

Home Office Eligibility - You may claim a home office **only if** the space is used **regularly and exclusively** for business and is your **principal place of business** or used to meet clients. You **cannot** claim it if the space is shared with personal use or used only occasionally.

Insurance & Professional Services

- Business liability insurance — Total: \$ _____
- Errors & omissions insurance — Total: \$ _____
- Commercial auto insurance (business portion) — Total: \$ _____
- Tax preparation fees (business portion) — Total: \$ _____
- Legal fees — Total: \$ _____
- Bookkeeping or payroll services — Total: \$ _____
- Consulting or coaching — Total: \$ _____

Other Common Schedule C Expenses

- Bank fees — Total: \$ _____
- Merchant processing fees — Total: \$ _____
- Uniforms or required clothing — Total: \$ _____
- Tools or protective equipment — Total: \$ _____
- Training or continuing education — Total: \$ _____
- Licenses & permits — Total: \$ _____
- Professional dues or subscriptions — Total: \$ _____
- Interest on business loans or credit cards — Total: \$ _____
- Startup costs (new business) — Total: \$ _____

Assets & Depreciation Review

- Vehicle used for business — Cost: \$ _____
- Computer or electronics — Cost: \$ _____
- Tools or equipment — Cost: \$ _____
- Furniture — Cost: \$ _____
- Machinery or large equipment — Cost: \$ _____
- Cameras or recording equipment — Cost: \$ _____
- One-time large purchases — Cost: \$ _____
- Section 179 / bonus depreciation considered Yes No

Taxes, Credits & Carryforwards

- Prior-year business loss carryforward — Amount: \$ _____
- Net operating loss (NOL) — Amount: \$ _____
- Business credits (Form 3800 related) — Amount: \$ _____
- State or local business taxes paid — Total: \$ _____
- Estimated tax payments made — Total: \$ _____
- QBI (20%) deduction eligibility reviewed Yes No

Schedule C-Related Adjustments

- Self-employed health insurance premiums — Total: \$ _____
- SEP-IRA contributions — Total: \$ _____
- Solo 401(k) contributions — Total: \$ _____
- HSA contributions — Total: \$ _____

Compliance & Risk Review

- Income reconciles to 1099s and records
- Expense levels reasonable for income
- Mileage aligns with revenue
- Cash income documented
- Prior-year IRS notices or audits reviewed
- Multi-state work or nexus considered
- Sales tax obligations reviewed

OTHER INFO OR NOTES:
