

# Self-Employment and Independent Contracting Tax Time Organizer



Use this organizer if you were paid in cash or by personal check,  
or if your payments were reported to you in box 7 on Form 1099-Misc, not on a W-2.

**Get set to do your 2011 taxes with AARP Tax-Aide and CASH Oregon!** Please organize your documents and complete this packet. Look at all three pages and complete the lines that apply to your business.

**We cannot help with complex business issues....** The volunteers are *not* trained in the *starred (\*)* issues, or in many other complex tax issues not listed here. We **CANNOT** do taxes for corporations or limited liability companies, for businesses with employees, for people with income and expenses from rental properties, for businesses with more than \$10,000 in expenses, for businesses that lost money. Our volunteers will only complete your return if they are trained in all of the relevant tax law.

**Keep your Paperwork in Order.** You should have receipts, invoices, mileage logs, and/or other records to support your income and expenses. Keep them and your tax return for at least 3 years.

**Find a Free Tax Site near you!** Call 2-1-1 or visit [www.cashoregon.org](http://www.cashoregon.org).

Business Income	
Form(s) 1099-Misc <i>Only if compensation is reported in Box 7</i>	\$
Cash/Check not reported on form 1099-Misc	\$
Other Business Income	\$
<b>Total Income</b>	<b>\$</b>

<b>Did You make Estimated Tax</b>	No <input type="checkbox"/>	If Yes: <input style="width: 90%;" type="text"/>
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**\* PLEASE NOTE:** If your total expenses are more than \$10,000, your business lost money, or any of the starred (\*) issues apply, we are unable to prepare your return. Our volunteers' IRS Certification does not cover all the tax rules that apply to these situations.

CASH Oregon Tax Organizer for Independent Contractors and the Self-Employed

Payments?	Unsure ____	Federal:\$_____	Oregon \$_____
<b>Business Operating Expenses</b>			
Advertising		\$	
Contract Labor <i>Payments you made to people who are <u>not</u> your employees</i>		\$	
Insurance			
Business or Professional Insurance		\$	
Health Insurance Premiums* <i>If you were <u>not</u> eligible for Health Insurance through another job or your spouse's job</i>		\$	See Note*
Legal and Professional Services <i>Such as business tax preparation or legal advice</i>		\$	
Office Supplies and Postage		\$	
Office Rent		\$	
Equipment Rent		\$	
Repairs		\$	
Materials and Supplies <i>Supplies you bought and used during the year.</i>		\$	
Taxes and Licenses <i>Example: County or city business license.</i>		\$	
Overnight Business Travel		\$	
Business Meals and Entertainment <i>Example: Taking a client to a business lunch, or buying yourself dinner while on an overnight business trip</i>		\$ Total	Multiply by .50 for deductible amount = \$
Other Expenses Examples:			
• Portion of phone for business use			
• Meals provided for children during child care			
• Purchased equipment to be depreciated*			
• Cost of Loans for the Business*			
• Value of Inventory*			
• Employee Wages*			
• Business use of Home*			

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<b>Total Business Operating Expenses</b>		\$
<b>Car/Transportation Expenses</b>		
Date Vehicle Placed in Service for Business		Note this for your tax return.
Personal Miles Miles unrelated to your business	mi.	Note this number for your tax return.
Commuting Miles Miles you drove from your home to a business location or from a business location to your home.	mi.	Note this number for your tax return.
<b>Business Miles</b> Miles you drove from one business location to another business location, OR miles you drove from your home to a temporary work location if your regular workplace is somewhere else.		
Business Miles before July 1, 2011	mi.	Multiply by \$0.51 = \$
Business Miles after July 1, 2011	mi.	Multiply by \$0.555 = \$
Total Cost of Business Miles (Add outlined numbers above to figure total mileage cost)	\$	
Other Transportation Costs	\$	
<b>Total Car/Transportation Expenses</b>	<b>\$</b>	

<b>Add up your Expenses</b>	
Total Business Operating Expenses (from pg. 2)	\$
Total Car/Transportation Expenses (from pg. 3)	\$
<b>Total Expenses</b> <i>See note if over \$10,000*</i>	<b>\$</b>

<b>Figure your Profit or Loss</b>	
Total Income (from pg. 1)	\$
Total Expenses (from pg. 3, above)	\$
Subtract Expenses from Income to figure <b>Profit or Loss</b>	<b>\$ Profit or Loss*</b> (Circle one. See Note for a Loss.)



AARP Tax-Aide is the nation's largest, free, volunteer-run tax preparation and assistance service. CASH (Creating Assets, Savings and Hope) Oregon is a community based non-profit organization created to help working families improve their financial future.



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