

# SELF-EMPLOYMENT TAX ORGANIZER

The Self-Employment Tax Organizer (SETO) is a tool to record your income and expenses from self-employment. The SETO collects the information needed to prepare Schedule C, which is used to report self-employment income and expenses on your tax return. Fill out each section of the SETO that is relevant to your business. Not all sections will apply to you.

## **SELF-EMPLOYMENT SCOPE**

- If you checked any of the below, please stop here and speak with one of our Counselors.
- If you checked none of these, please continue by completing the worksheet below for each business.

	I paid employees or other individuals		I received a Form 1095-A
	I want to deduct a home office		I have assets to depreciate (any > \$2,500)
	I had more than \$50,000 in business expenses		I don't use the cash method of accounting
	I kept an inventory for my business		

## **BASIC INFORMATION**

Your name \_\_\_\_\_

Business name \_\_\_\_\_  
(If no separate name, leave blank.) \_\_\_\_\_

Business address \_\_\_\_\_  
(If no separate address, leave blank.) \_\_\_\_\_

Business or profession \_\_\_\_\_  
(What do you do?) \_\_\_\_\_

## **INCOME FROM SELF-EMPLOYMENT**

Forms 1099-NEC  
(Enter the total for all forms received.) \$ \_\_\_\_\_

Forms 1099-K  
(Enter the total for all forms received.) \$ \_\_\_\_\_

Total cash, checks, and credit card payments paid to you.  
(Include tips in this amount.) \$ \_\_\_\_\_

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Other self-employment income, like grants/awards for the business.  
(List the type of income. DO NOT include W-2s.)

\$ \_\_\_\_\_

**Total income from  
self-employment**

\$ \_\_\_\_\_

## **ESTIMATED TAX PAYMENTS**

Did you make estimated payments to the IRS or Oregon Department of Revenue in 2023 for tax year 2023?

YES

NO

If you made estimated payments, how much did you pay?

IRS                    April \$ \_\_\_\_\_    June \$ \_\_\_\_\_    Sept \$ \_\_\_\_\_    Jan \$ \_\_\_\_\_

Oregon                April \$ \_\_\_\_\_    June \$ \_\_\_\_\_    Sept \$ \_\_\_\_\_    Jan \$ \_\_\_\_\_

## **EXPENSES**

Advertising	\$ _____	Rent or lease of equipment	\$ _____
Contract labor	\$ _____	Rent of workspace/property	\$ _____
Commissions & fees	\$ _____	Repairs & maintenance on equipment	\$ _____
Health insurance premiums	\$ _____	Other supplies	\$ _____
Business liability insurance	\$ _____	Business licenses	\$ _____
Interest – paid on a business loan or business credit card	\$ _____	Sales tax paid to the state	\$ _____
Legal & professional services	\$ _____	Business travel (airfare, hotel, etc.)	\$ _____
Office supplies (paper, toner, etc.)	\$ _____	Business meals with customers or while traveling	\$ _____

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## **UTILITY EXPENSES**

If you used your cell phone for business:

1. What was the annual cost for your cell phone? \$ \_\_\_\_\_
2. What percentage of the time was your cell phone used for business? \_\_\_\_\_ %

Expense amount \$ \_\_\_\_\_

If you paid for internet for your business:

1. What was the annual cost for your internet? \$ \_\_\_\_\_
2. What percentage of the time was your internet used for business? \_\_\_\_\_ %

Expense amount \$ \_\_\_\_\_

Other business utility costs \$ \_\_\_\_\_

## **OTHER EXPENSES**

Professional education	\$ _____	Postage & freight	\$ _____
Safety equipment or specialized clothing (goggles, uniforms, etc.)	\$ _____	Dues or publications for professional organizations	\$ _____
Parking & tolls	\$ _____	Other: _____	\$ _____
Other: _____	\$ _____	Other: _____	\$ _____

## **VEHICLE INFORMATION**

What date was your vehicle first used for business? (month/day/year)

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What is the make and model of your vehicle? (ex: Kia Sol or Ford F-150)

List your mileage for the year.

Business miles: \_\_\_\_\_ Commuting miles: \_\_\_\_\_ Personal miles \_\_\_\_\_

From one work site to another work site or from a W2 job to a work site.

From home to a work site or returning from a work site to home.

Not related to work.

Do you (or your spouse) have another vehicle available for personal use?

YES  NO

Was your vehicle available for personal use during off-duty hours?

YES  NO

Do you have evidence to support your deduction?

YES  NO

If yes, is the evidence in writing?  
(e.g.: mileage log or app for tracking mileage)

Uber and Lyft Drivers: Do you have a mileage summary from your online account?

YES  NO

## MAJOR PURCHASES

Item	Date of purchase (month/day/year)	Cost	Business use percentage
	/ /	\$	%
	/ /	\$	%