

# 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.

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

## 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.) \$ \_\_\_\_\_

# SELF-EMPLOYMENT TAX ORGANIZER

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	\$ _____

# SELF-EMPLOYMENT TAX ORGANIZER

## 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)

\_\_\_\_\_

# SELF-EMPLOYMENT TAX ORGANIZER

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?

YES

NO

(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
	/ /	\$	%
	/ /	\$	%