Self-Employment & Schedule C

Use for gig work, cash jobs, and sole-proprietor business activity.

Client name: Tax year:

01 | Business identity

Business name, type of work, ownership, start/stop dates, business address/state, and whether you own more than one business. Do not enter EINs here.

02 | Accounting and records

How do you keep books? Cash or accrual, if known? List bookkeeping software, bank records, invoices, receipts, and any gaps.

03 | All business receipts

Give cash, check, payment-app, card, and platform sales; refunds and allowances; and 1099-NEC/MISC/K forms. Identify forms covering the same receipts.

04 | Goods and inventory

Do you sell products? Give beginning/ending inventory, purchases, production costs, personal withdrawals, and your inventory method if known.

05 | Expense breakdown

List advertising, office expenses, supplies, insurance, rent, utilities, licenses, professional fees, repairs, and other expenses with amounts and records.

06 | Workers and payments

Did you pay employees or contractors? List types of payments, amounts, payroll records, information returns filed, and missing payee paperwork. No SSNs here.

Answer every item. Write None or Not sure when needed. Add a page for extra people/assets.

Save and reopen to check answers. Return only through your own preparer's secure portal.

This questionnaire is not an e-file authorization, tax election, or determination of eligibility.

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07 | Vehicle and travel

Any business vehicle, mileage, travel, meals, parking, or tolls? Describe business purposes and records. Complete the vehicle form if applicable.

08 | Equipment and other assets

List purchases/sales of equipment, furniture, software, and other assets. Include cost, purchase date, first business-use date, business-use percentage, and financing.

09 | Home office

Describe business use, exclusivity/regularity, office and total home square footage, home costs, ownership/rental, and other work locations.

10 | Other adjustments

Any startup costs, reimbursements, loans, grants, insurance proceeds, personal expenses in business records, or business expenses paid personally?

11 | Prior-year information

Provide the prior business return, depreciation schedules, carryovers, accounting/election details if known, and any business IRS/state notices.

12 | Missing records and questions

List missing items and questions. Do not guess mileage or expenses. Your preparer may request clarification before completing Schedule C.