

**TAX ORGANIZER**

YEAR: \_\_\_\_\_



SELF EMPLOYMENT & SMALL BUSINESS (P.1)

**BUSINESS INCOME AND EXPENSES**

<b>1. INCOME</b>		<b>2. VEHICLE INFORMATION</b>	
Gross receipts or sales	\$ _____	Year: _____	Make/Model: _____
Returns and allowances	\$ _____	Purchase Price \$ _____	Date of Purchase: _____
Other income (describe in comments)	\$ _____	Business Miles _____	Other _____
Inventory at beginning of year	\$ _____	Fuel, oil, repairs & maintenance	\$ _____
Cost of labor	\$ _____	Parking fees & tolls	\$ _____
Materials and supplies COG	\$ _____		
Other COG	\$ _____		
Inventory at end of year	\$ _____		

<b>3. EXPENSES</b>			
Advertising	\$ _____	Pension & Prof. Sh.	\$ _____
Commissions & Fees	\$ _____	Supplies & Mat.	\$ _____
Contract Labor	\$ _____	Training/Educat.	\$ _____
Depletion	\$ _____	Travel	\$ _____
Employee Benefits	\$ _____	Meals & Ent.	\$ _____
Employee Wages	\$ _____	Uniforms	\$ _____
Bank Fees	\$ _____	Office Expenses	\$ _____
Legal and Prof. fees	\$ _____	Taxes & Licenses	\$ _____
		Rental - Tools, etc.	\$ _____
		Utilities	\$ _____
		Rent - Shop/Office	\$ _____
		Mortgage Interest	\$ _____
		Repairs & Maint.	\$ _____
		Business Insurance	\$ _____
		Other	\$ _____

<b>4. SALES, PURCHASES &amp; DISPOSITION OF ASSETS IN 2023</b>					
Assets Purchased	Date	Purchase Price	Assets Sold/Disposed of	Date	Purchase Price
	/ /	\$ _____		/ /	\$ _____
	/ /	\$ _____		/ /	\$ _____
	/ /	\$ _____		/ /	\$ _____
	/ /	\$ _____		/ /	\$ _____
	/ /	\$ _____		/ /	\$ _____

<b>5. BUSINESS USE OF HOME</b>			
Sq. ft of area used for business	_____	Total sq. ft. of home	_____
Was home used as a daycare facility?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Date began using for service	_____
Casualty Losses	\$ _____	Insurance	\$ _____
Mortgage Interest	\$ _____	Repairs & Maint.	\$ _____
Real Estate Taxes	\$ _____	Utilities	\$ _____
		Rent	\$ _____
		FMV of home	\$ _____
		Value of land	\$ _____
		Carryover of unallowed expenses	\$ _____

**DEDUCTIONS**

**1. EDUCATION**

Student 1 Name _____			Educational Inst.: _____					
Tuition & fees	Loan Interest Paid	Supplies & Books	FR	SO	JR	SR	Other	529 Plan
\$ _____	\$ _____	\$ _____	<input type="checkbox"/>					
Student 2 Name _____			Educational Inst.: _____					
Tuition & fees	Loan Interest Paid	Supplies & Books	FR	SO	JR	SR	Other	529 Plan
\$ _____	\$ _____	\$ _____	<input type="checkbox"/>					
Student 3 Name _____			Educational Inst.: _____					
Tuition & fees	Loan Interest Paid	Supplies & Books	FR	SO	JR	SR	Other	529 Plan
\$ _____	\$ _____	\$ _____	<input type="checkbox"/>					

**2. JOB-RELATED MOVING EXPENSES**

Lodging	\$ _____	Miles from old home to new work	_____
Fuel	\$ _____	Miles from old home to old work	_____
Mileage	\$ _____	Member of Armed Forces?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Other	\$ _____		

**3. IRA CONTRIBUTIONS**

Contributions to traditional IRA	\$ _____
Contributions to ROTH or IRA	\$ _____

**4. OTHER DEDUCTIONS**

Educator Expenses	\$ _____	Alimony Paid	\$ _____
Health Savings Account Contr.	\$ _____	<i>Date of divorce/sep.</i>	_____/_____/_____
Archer Medical Savings Contr.	\$ _____	Qualified business net loss carryover from 2022	\$ _____
Jury duty repymt to employer	\$ _____	Qualified REIT dividends & PTP net loss carryover from 2022	\$ _____
Foreign qualified housing exp.	\$ _____		
Contr. To 529 College Plan	\$ _____		

**5. MISCELLANEOUS DEDUCTION QUESTIONS**

1. Did you purchase an item(s) in 2023 in which you paid a large sales tax?	<input type="checkbox"/> Yes <input type="checkbox"/> No
2. Did you purchase (NOT lease) an electric or plug-in hybrid vehicle during 2023?	<input type="checkbox"/> Yes <input type="checkbox"/> No
a. Did you receive the EV tax credit as an instant discout at the dealership?	<input type="checkbox"/> Yes <input type="checkbox"/> No
b. Please list the year, make and model: _____	
3. Did you refinance a mortgage during 2023?	<input type="checkbox"/> Yes <input type="checkbox"/> No

**NOTES ON DEDUCTIONS**

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