

To ensure we can prepare your return accurately and avoid delays, please provide the following documents if they apply to you:

Proof of Income

- 1099-NEC or 1099-K forms are required.
- If you are reporting more income than what is shown on your 1099, you must provide proof of the additional income (examples: invoices, payment receipts, business bank statements, payout reports or employer statements.)

Proof of expenses

- Provide receipts, invoices, or statements for all expenses you are claiming.
- Keep in mind expenses must be ordinary and necessary for your business.

Mileage Documentation

- If you are claiming mileage, you must provide a detailed mileage log (date, purpose, start and end miles, total miles driven)
- Alternatively, you may provide trip summary forms from your employer (e.g., Uber, Lyft, DoorDash, etc.)

****Please note:** Commuting miles (miles driven from home to your regular work location and back) are not deductible and cannot be claimed on your tax return.

Important: We cannot claim income or expenses without proper documentation. This self-employment statement must be submitted together with all business forms and other documents for it to be processed correctly. Submitting complete and accurate documents will help the process go smoothly and reduce the chances of IRS questions later.

Complete Tax Self-Employment Statement

Taxpayer Name: _____ Business Name: _____

Business Address: _____

Employer ID (if any) _____

Description of Business (type of work, where business is conducted, hours):

What type of records do you maintain to verify business income and expenses?

(Check all boxes that apply. Please make sure you can provide support, by law, you are required to keep adequate records.)

- | | | |
|---|--|---|
| <input type="checkbox"/> Accounting Records | <input type="checkbox"/> Records on Computer | <input type="checkbox"/> Bank Statements |
| <input type="checkbox"/> Invoices/Receipts | <input type="checkbox"/> Business Cards (please provide) | <input type="checkbox"/> Credit Card Statements |
| <input type="checkbox"/> Advertising | <input type="checkbox"/> Car/Truck Expense | <input type="checkbox"/> Rent Expense |
| <input type="checkbox"/> Log Books | <input type="checkbox"/> Handwritten Ledgers | <input type="checkbox"/> Business Insurance |
| <input type="checkbox"/> Client Lists | <input type="checkbox"/> Appointment Book(s) | <input type="checkbox"/> Notebook(s) |
| <input type="checkbox"/> Other (describe) _____ | <input type="checkbox"/> Suppliers (name primary) _____ | |

This is not an all-inclusive list. If you have other documents supporting your business please explain:

If you did **NOT** keep copies/records of all activity can you reasonably reconstruct your income and expenses?

Did you file state and/or local sales tax returns for the tax year? ☐ YES ☐ NO

Did you receive 1099-MISC or 1099-NEC? ☐ YES ☐ NO

If you didn't receive 1099-MISC or 1099-NEC can you show steps to calculate income? ☐ YES ☐ NO

Is a license required for your occupation? ☐ YES ☐ NO

Do you have a business license? ☐ YES ☐ NO

Did you pay anyone to work for you? ☐ YES ☐ NO

Did you issue any workers a 1099 or W-2? ☐ YES ☐ NO

How were you paid? ☐ Cash ☐ Check ☐ Credit Card ☐ Other(describe)_____

Complete Tax

2025 Self Employment Statement

How do you advertise for your business? ☐ Newspaper ☐ Online ☐ Flyers

Other (describe) _____

INFORMATION ABOUT YOUR VEHICLE: Complete this section ONLY if you are claiming vehicle expenses.
You can claim expenses OR mileage, not both. (Note: Driving to and from work is considered commuting and generally is not deductible)

What are you using the vehicle for in your business? _____

What was the cost of the vehicle? \$ _____

Which method are you using this year? ☐ Standard Mileage ☐ Actual Expenses

When was the vehicle placed in service for business purposes? (M/D/Y) _____

Method used in first year of business? ☐ Standard Mileage ☐ Actual Expenses

Total miles were driven this year:

Business: _____ Commuting: _____ Other: _____

Was the vehicle available for personal use during off-work hours? ☐ YES ☐ NO

Do you have support such as gas receipts, mileage logs or other written evidence to support deduction?

☐ YES ☐ NO

Summary of Gross Receipts

If you did not receive tax forms (1099's) you must calculate the income received each month and provide proof of income (such as receipts, bank deposits, statements, etc. Add each month and use the total in Complete Tax as the income amount

JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE
JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER

Summary of Expenses

Please provide the entire year of records of expenses and enter below. Add up all the yearly totals and enter it as the expense amount in Complete Tax.

Advertising (newspaper, online, social media subscriptions, signs, business cards, TV	\$
Fees, Commissions, Salaries	\$
Contract Labor	\$
Prior Depreciation: provide last year's depreciation worksheet	\$
List purchased items used in Business with Useful Life Over 1 year:	
1.	\$
2.	\$
3.	\$
4.	\$
5.	\$
6.	\$
7.	\$
Employee Benefits Programs	\$
Home Office (Space Used Exclusively for Business)	
Provide square footage of room used for Business	
Provide square footage of home	
Legal & Professional Servies	\$
Fees for prior year business tax return	\$
Office Expenses	\$
If you do NOT have any business expenses, please explain below:	

Complete Tax

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Rent/Lease	
1. Vehicles	\$
2. Machinery	\$
3. Equipment	\$
4. Other Business Property	\$
Repairs & Maintenance	\$
Supplies Used in Business	\$
Taxes	\$
Licenses & Permits	\$
Meals While Away – Overnight (allowable)	\$
Business Entertainment Expenses (necessary, allowable)	\$
Cellphone – allocate cost for business	\$
Other Expenses – Please List:	
1.	\$
2.	\$
3.	\$
4.	\$

I, acknowledge that I have receipts and records regarding my personal business in my possession. I have provided the above summary to Complete Tax for the preparation of my individual tax return and provided all of the receipts and records.

Signature _____

Date _____