

# Self-Employment Summary

Taxpayer Name \_\_\_\_\_

Last 4 of SSN \_\_\_\_\_

Business Activity \_\_\_\_\_

EIN if applicable \_\_\_\_\_

1. Is this a new business?  YES  NO
2. Does the taxpayer have a professional license/ certification (i.e barber/beautician, carpentry, mechanics, etc)?  YES  NO
3. Is business registered on Sunbiz?  YES  NO
4. Type of company  DBA  LLC  S-Corp  C-Corp
5. Did your business have a loss in a prior year?  YES  NO Explain \_\_\_\_\_

## INCOME

6. What was your income/revenue for 2025? \$ \_\_\_\_\_
7. Did the taxpayer receive 1099-NEC?  YES  NO If yes, what is the total of box 7 on **ALL** the 1099-NEC \$ \_\_\_\_\_
8. Did the taxpayer receive 1099K?  YES  NO If yes, what is the total credit card sales \$ \_\_\_\_\_

## EXPENSES

9. What was your cost of expenses for 2020? \_\_\_\_\_

<input type="checkbox"/>	Advertising		Office Expenses	
<input type="checkbox"/>	Contract Labor		Supplies	
<input type="checkbox"/>	Other:		Other:	

## MILEAGE

10. Does the taxpayer use their vehicle for business?  YES  NO \*if no, stop here\*
- Is this vehicle dedicated solely for business?  YES  NO
11. Vehicle Information  
Year \_\_\_\_\_ Make \_\_\_\_\_ Model \_\_\_\_\_
12. How many business miles did taxpayer drive \_\_\_\_\_
13. Toll expenses, if applicable \_\_\_\_\_

## USE OF HOME

14. Does the taxpayer use their home for business?  YES  NO \*if no, stop here\*
15. Does the taxpayer use an area designated exclusively for the business?  YES  NO
16. If yes, what is square foot of the home? \_\_\_\_\_
17. What is square foot of the designated area? \_\_\_\_\_
- Cost of rent/mortgage \_\_\_\_\_
- Cost of utilities \_\_\_\_\_
- Other home expenses \_\_\_\_\_

I, the Tax Preparer, certify that the information in this reconstruction was provided by the taxpayer. Taxpayer was only offered guidance by asking reasonable inquires to help determine income and expenses as per the IRS "knowledge" requirement.

\_\_\_\_\_  
Tax Preparer

\_\_\_\_\_  
Date