

GREGG KATZ / BUSINESS INCOME TAX RETURN INTAKE FORM

YOU CAN PRINT THIS OR FILL IT IN, SAVE IT AND THEN EMAIL IT TO ME.

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Tax year: _____ Client/legal name: _____

If you are an independent contractor, freelancer, sole proprietor, or a single-member LLC, the IRS treats these the same for federal tax filing purposes.

- All are reported on Schedule C (Profit or Loss From Business).
- Income and expenses flow through your personal tax return (Form 1040).
- The business does not file a separate federal income tax return.
- The IRS looks at what you do, not what you call the business.
- You may use an SSN or EIN, depending on your setup.

Note: A single-member LLC is disregarded for federal tax purposes unless you elected S-Corp or C-Corp taxation.

Business Identity & Registration

- ☐ Business name (if different from legal name): _____
- ☐ Operating as: ☐ Independent Contractor ☐ Sole Proprietor ☐ Single-Member LLC
- ☐ DBA / Trade name (if any): _____
- ☐ Uses an EIN for business? ☐ Yes ☐ No EIN: _____
- ☐ Uses SSN instead of EIN for tax reporting
- ☐ EIN used for (check all): ☐ 1099s issued ☐ Payroll ☐ Bank account ☐ State registrations
- ☐ Accounting method used: ☐ Cash ☐ Accrual ☐ Not sure

Schedule C - Income Review (Totals Needed)

- | | | | |
|--|------------|----|-------|
| ☐ 1099-NEC income | Total: | \$ | _____ |
| ☐ 1099-K income | Total: | \$ | _____ |
| ☐ 1099-MISC (business income) | Total: | \$ | _____ |
| ☐ Platform income (Uber, Amazon Flex, DoorDash, Etsy, etc.) | Total: | \$ | _____ |
| ☐ Cash payments received | Estimated: | \$ | _____ |
| ☐ Zelle / Venmo / Cash App / PayPal (business only) | Total: | \$ | _____ |
| ☐ Checks deposited for business | Total: | \$ | _____ |
| ☐ Tips or gratuities | Total: | \$ | _____ |
| ☐ Barter or trade income | Estimated: | \$ | _____ |
| ☐ Refunds from vendors or suppliers | Total: | \$ | _____ |
| ☐ Bonuses, incentives, or prizes related to work | Total: | \$ | _____ |
| ☐ Cancelled business debt (1099-C) | Amount: | \$ | _____ |
| ☐ State or local grants | Amount: | \$ | _____ |
| ☐ Other business income not reported on forms | Total: | \$ | _____ |
| ☐ Sales tax collected from customers (not income) | Amount: | \$ | _____ |

Cost of Goods Sold (If You Sell Products)

- | | | | |
|--|--------|----|-------|
| ☐ Inventory at beginning of year | Value: | \$ | _____ |
| ☐ Purchases of products or materials | Total: | \$ | _____ |
| ☐ Cost of labor directly tied to production | Total: | \$ | _____ |
| ☐ Other production costs | Total: | \$ | _____ |
| ☐ Inventory at end of year | Value: | \$ | _____ |
- ☐ Do you track inventory? ☐ Yes ☐ No

Vehicle & Travel Expenses (Totals Needed)

☐ Total mileage	Miles:	_____
☐ Business mileage	Miles:	_____
☐ Personal mileage	Miles:	_____
☐ Fuel	Total:	\$ _____
☐ Oil changes & routine maintenance	Total:	\$ _____
☐ Repairs	Total:	\$ _____
☐ Registration & inspection fees	Total:	\$ _____
☐ Vehicle insurance (business portion)	Total:	\$ _____
☐ Parking & tolls	Total:	\$ _____
☐ Business travel (airfare, lodging, transportation)	Total:	\$ _____
☐ Meals while working	Total:	\$ _____
☐ Vehicle used:	☐ Personal ☐ Business-only ☐ Multiple vehicles	
☐ Make, model and year of vehicle:	_____	

Office, Tech & Operating Expenses

☐ Cell phone (business portion)	Total:	\$ _____
☐ Internet service (business portion)	Total:	\$ _____
☐ Computer / tablet	Total:	\$ _____
☐ Printer & peripherals	Total:	\$ _____
☐ Software & subscriptions	Total:	\$ _____
☐ Office supplies	Total:	\$ _____
☐ Printing & postage	Total:	\$ _____

Website, Online Services & Advertising (Commonly Missed)

☐ Website hosting	Total:	\$ _____
☐ Domain registration	Total:	\$ _____
☐ Website builder or maintenance (Wix, Squarespace, WordPress, etc.)	Total:	\$ _____
☐ Email services (Google Workspace, Outlook, etc.)	Total:	\$ _____
☐ Cloud storage / backups	Total:	\$ _____
☐ Google Ads	Total:	\$ _____
☐ Facebook / Instagram ads	Total:	\$ _____
☐ Other online ads or boosted posts	Total:	\$ _____
☐ Yelp or directory ads	Total:	\$ _____
☐ Business cards & printed marketing	Total:	\$ _____
☐ Referral or lead-generation fees	Total:	\$ _____

Contract Labor & Payments to Others

- ☐ Contract labor / subcontractors paid Total: \$ _____
- ☐ Number of contractors paid: _____
- ☐ Paid any one person \$600 or more? ☐ Yes ☐ No

For each contractor paid \$600 or more:

Name: _____

Address: _____

SSN or EIN: _____

Amount paid: \$ _____

- ☐ W-9s collected ☐ Yes ☐ No
- ☐ 1099-NECs issued ☐ Yes ☐ No ☐ Not sure

What Counts as Contract Labor?

Payments to non-employees for services, such as bookkeepers, virtual assistants, consultants, web designers, IT support, marketing or social media managers, independent helpers or drivers, and cleaning, repair, or maintenance services.

If you paid \$600 or more to any one contractor, you are generally required to issue Form 1099-NEC, regardless of how they were paid.

Home Office (If Applicable)

- ☐ Area used exclusively for business
- ☐ Square footage of home office: _____
- ☐ Rent or mortgage interest Total: \$ _____
- ☐ Utilities Total: \$ _____
- ☐ Property taxes Total: \$ _____
- ☐ Homeowners or renters insurance Total: \$ _____
- ☐ Repairs (direct/indirect) Total: \$ _____

Home office eligibility: You may claim a home office only if the space is used regularly and exclusively for business and is your principal place of business or used to meet clients. You cannot claim it if the space is shared with personal use or used only occasionally.

Insurance & Professional Services

- ☐ Business liability insurance Total: \$ _____
- ☐ Errors & omissions insurance Total: \$ _____
- ☐ Commercial auto insurance (business portion) Total: \$ _____
- ☐ Tax preparation fees (business portion) Total: \$ _____
- ☐ Legal fees Total: \$ _____
- ☐ Bookkeeping or payroll services Total: \$ _____
- ☐ Consulting or coaching Total: \$ _____

Other Common Schedule C Expenses

☐ Bank fees	Total:	\$	_____
☐ Merchant processing fees	Total:	\$	_____
☐ Uniforms or required clothing	Total:	\$	_____
☐ Tools or protective equipment	Total:	\$	_____
☐ Training or continuing education	Total:	\$	_____
☐ Licenses & permits	Total:	\$	_____
☐ Professional dues or subscriptions	Total:	\$	_____
☐ Interest on business loans or credit cards	Total:	\$	_____
☐ Startup costs (new business)	Total:	\$	_____

Assets & Depreciation Review

☐ Vehicle used for business	Cost:	\$	_____
☐ Computer or electronics	Cost:	\$	_____
☐ Tools or equipment	Cost:	\$	_____
☐ Furniture	Cost:	\$	_____
☐ Machinery or large equipment	Cost:	\$	_____
☐ Cameras or recording equipment	Cost:	\$	_____
☐ One-time large purchases	Cost:	\$	_____
☐ Section 179 / bonus depreciation considered ☐ Yes ☐ No			

Taxes, Credits & Carryforwards

☐ Prior-year business loss carryforward	Amount:	\$	_____
☐ Net operating loss (NOL)	Amount:	\$	_____
☐ Business credits (Form 3800 related)	Amount:	\$	_____
☐ State or local business taxes paid	Total:	\$	_____
☐ Estimated tax payments made	Total:	\$	_____
☐ QBI (20%) deduction eligibility reviewed ☐ Yes ☐ No			

Schedule C-Related Adjustments

☐ Self-employed health insurance premiums	Total:	\$	
☐ SEP-IRA contributions	Total:	\$	
☐ Solo 401(k) contributions	Total:	\$	
☐ HSA contributions	Total:	\$	

Compliance & Risk Review

☐ Income reconciles to 1099s and records

☐ Expense levels reasonable for income

☐ Mileage aligns with revenue

☐ Cash income documented

☐ Prior-year IRS notices or audits reviewed

☐ Multi-state work or nexus considered

☐ Sales tax obligations reviewed

OTHER INFO OR NOTES