



Platinum Financial Services

P.O. Box 870668

Stone Mountain, GA 30087

Tel: 678.614.0393 Fax: 678.476.9937

www.kmcgurncpa.com

Self Employed Business Income and Expenses

Name of business (A)		EIN, A _____
Address of business (A)		
Name of business (B)		EIN, B _____
Address of business (B)		

Describe activities _____

		Business A Prior Year	Current Year	Business B Prior Year	Current Year
1	Gross receipts or sales				
2	Returns and allowance				
3	Inventory at beginning of year				
4	Inventory at end of year				
5	Cost of merchandise purchased				
6	Cost of labor				
7	Materials and supplies				
8	Bad debts from sales or services				
9	Depletion				
10	Depreciation				
	Sales Expenses				
11	Advertising				
12	Appraisal Fees				
13	Bank Charges				
14	Business Cards				
15	Travel				
16	Car and truck expenses				
17	Business Entertainment				
18	Business Meals				
19	Client gifts				
20	Commissions / Referrals				
21	Courier Service / Fed Ex				
22	Film / Processing				
23	Flowers / Cards				
24	Keys / Locksmiths				
25	Lock Boxes				
26	Maps / Books				
27	Office Expenses				
28	Photocopying				
29	Postage				
30	Printing				
31	Rent or lease: machinery / equipment				

32	Rent or lease: other business property				
33	Repairs and maintenance				
34	Sales Assistants				
35	Signs, Flags, Banners				
36	Subcontracted Labor				
37	Supplies				
38	Tools				
39	Wages				
40	Payroll Taxes				
41	Taxes and licenses				
42	Employee Benefits				
43	Other				
	Professional Expenses				
44	Audio / Visual Aids				
45	Continuing Education				
46	Licenses				
47	Memberships				
48	Publications				
49	Seminars				
50	Other				
	Communications Expenses				
51	Cable (Business use only)				
52	Cell Phone				
53	Fax / Modem / DSL / Cable				
54	Internet / Web Page				
55	Long Distance				
56	Pay Phone				
57	Telephone (2nd Line)				
58	Other				
	Equipment and Software Expenses				
59	Attache / Brief Case				
60	Calculator / PDA				
61	Camera				
62	Cell Phone				
63	Computer				
64	Fax Machine / Scanner				
65	File Cabinets				
66	Office Furniture				
67	Printer / Copier				
68	Software				
69	Tape Recorder				
70	Telephone				
71	Other				
	Other expenses				
72	Insurance (not health)				
73	Mortgage interest				
74	Other interest				
75	Legal and professional services				
76	Pension and profit-sharing plans				
77	Utilities				
78	Other				
	Total				

Office in Home

Name . _____

Tax Year _____

Self-Employed Business Use of Home Expenses			
		Amount	Remarks
1	Used Exclusively for Business? Yes_____ No _____		
2	Total Living Area in home (square feet)		
3	Area Used for Business (square feet)		
4	1st Mortgage interest		
5	2nd Mortgage interest		
6	Equity Line Interest		
7	Other Home Interest		
8	Real Estate Taxes		
9	Home Owners or Renter's Insurance		
10	General Repairs (plumber, electrician, etc)		
11	Repairs to office area		
12	Cleaning / Maintenance		
13	Yard Work / Snow Removal		
14	Condo Fees		
15	Rent Paid (If Renting)		
16	Home Owners Association Dues		
17	Utilities (Gas, Oil, Electric, Water)		
18	Communications (Telephone, Internet)		
19	Trash Collection Fees		
20	Other Expenses		
21	Purchase price of home *		
22	Value of land at time of purchase		
23	Date of purchase		
24	Improvements (Additions, Renovation)		
25	Date placed in service for Business use		
26	Other		
	Total		

* Please provide copy of Settlement Sheets for purchase and any refinancing

Vehicle and Travel Expenses

Name _____

Tax year _____

		Amount	Remarks
1	Vehicle Expenses		
2	Description of Auto		
3	Date Purchased		
4	Purchase Price (Incl. Tax)		
5	Date placed in Bus.Use		
6	Odometer - beginning of year		
7	Odometer - end of year		
8	Total miles this year		
9	Business miles		
10	Commuting Miles		
11	Daily Avg. R / T commute		
12	Personal Miles		
13	Is Car leased?	Yes _____ No _____	
14	is Car owned?	Yes _____ No _____	
15	Depreciated in prior.year?	Yes _____ No _____	
16	Gas / Oil / Lube		
17	Repairs and Maintenance		
18	Tires		
19	Insurance		
20	Auto License / Tags		
21	Personal Property Tax		
22	Lease Payments		
23	Interest (Auto Loan)		
24	Warranty		
25	Inspection		
26	Parking / Tolls		
27	Car Washes		
28	Auto Club		
29	Other		
	Travel Expenses		
30	Airfare / Trainfare		
31	Car rentals / Gas / Insurance		
32	Taxis, Bus, Shuttles		
33	Lodging		
34	Meals (while on Travel)		
35	Entertainment (on travel)		
36	Tips		
37	Telephones / Faxes		
38	Dry Cleaning (out of town)		
40	Other		
	Total		