



**SUSAN SILVERMAN QUIGLEY, CFP®**  
 CERTIFIED FINANCIAL PLANNER

8 YALE STREET · GARDEN CITY, NEW YORK 11530  
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**Self-Employed Income**

**IF YOU'RE A SELF-EMPLOYED CLIENT, PLEASE UPLOAD A SPREADSHEET TO THE TAX PORTAL**

**IF YOU HAVE ANY SELF-EMPLOYED INCOME (1099, EBAY, ETSY, UBER, ETC...) YOU CAN DEDUCT RELATED EXPENSES.**

**REMEMBER ZELLE, VENMO & PAYPAL WILL BE REPORTING THIS YEAR FOR TRANSACTIONS TOTALLING \$600 OR MORE**

**MAKE SURE TO LOG ON & DOWNLOAD YOUR 1099Ks**

- 1 Did you contribute to a self-employment retirement plan (SEP, Keogh, Solo 401k). If so, please enter \$ amount.
- 2 Do you have a home office used for business? (NOT related to your W2 income) If so, please refer to the home office expenses sheet below & fill in \$ amounts.

Advertising .....

Car and truck expenses .....

Commissions and fees .....

Contract labor .....

Depletion ..

Depreciation and section 179 expense deduction (not included in Part III) .....

Employee benefit programs (other than on line 19)

Dependent care benefits

Other employee benefit programs

Insurance (other than health)

Interest:

Mortgage (paid to banks, etc.) .....

Other .....

Legal and professional services .....

Office expense (see inst.) .....

Pension and profit-sharing .....

Rent or lease:

Vehicles, machinery, and equipment .....

Other business property .....

Repairs and maintenance .....

Supplies (not in Part III) .....

Taxes and licenses .....

Travel and meals:

Travel .....

Deductible meals (see instr.)

Enter totals below:

100% deductible ....

80% deductible (DOT)

50% deductible .....

Utilities .....

Wages (less employment credits)

- 3 If you have any online earned income from Zelle, Venmo, PayPal, or other cash apps from services or sale of goods (Uber, Ebay, Etsy, etc.), please upload 1099K



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**Home Office**

Please answer all questions below if you have a home office

- 1 Square footage of your house (not including basement or attic)
- 2 Square footage of your home office (not necessarily just the room)

**Home Office Worksheet**

Please answer all questions below if you have a home office

**Direct expenses - Expenses that are paid only for the business part of your home.**  
 For example, if you paint or repair only the area used for business, that would be a direct expense.

**Indirect expenses - Expenses that are necessary to keep you entire home functioning.**  
 For example, electricity is needed for your entire house to function but only the percentage used for business purposes would be deductible.

- 1 Homeowners or Renters Insurance \_\_\_\_\_
- 2 Rent / Mortgage \_\_\_\_\_
- 3 Repairs & Maintenance \_\_\_\_\_
- 4 Electric \_\_\_\_\_
- 5 Gas / Oil \_\_\_\_\_
- 6 Cable \_\_\_\_\_
- 7 Water \_\_\_\_\_
- 8 Cell \_\_\_\_\_
- 9 Internet \_\_\_\_\_
- 10 Other expenses (landscaper, housekeeper, etc.) \_\_\_\_\_

Direct Expenses	Indirect Expenses

**\*\*Office supplies and equipment go directly on Schedule C unless specifically used for the office (i.e., a new printer or a chair)\*\***