



2026 Schedule C Organizer — Self-Employed / Sole Proprietor

Fill in the YELLOW cells only (enter totals for Jan 1 – Dec 31, 2026). Gray cells calculate automatically. Leave blank if not applicable.

BUSINESS INFORMATION

Taxpayer name	
Business name (if different)	
Business EIN (if any)	
Principal business / product or service	
Business address	
Accounting method (Cash / Accrual)	
Paid any contractor \$600+? (Yes/No)	
Phone / email	

PART I — INCOME

Line	Description	Amount	What to include
1	Gross receipts or sales		All business income, including amounts on Forms 1099-NEC, 1099-MISC, 1099-K (Square, PayPal, Stripe, etc.)
2	Returns and allowances		Refunds and discounts given to customers
6	Other business income		e.g., interest on business accounts, fuel tax credits, recovered bad debts

PART III — COST OF GOODS SOLD (only if you sell products)

Line	Description	Amount	What to include
35	Inventory at beginning of year		Should match last year's ending inventory
36	Purchases (less items withdrawn for personal use)		
37	Cost of labor (not paid to yourself)		
38	Materials and supplies		
39	Other costs (freight-in, packaging, etc.)		
41	Inventory at end of year		Physical count or best estimate at Dec 31
42 / 4	Cost of goods sold (calculated)		-

PART II — EXPENSES

Line	Expense category	Amount	What to include / examples
8	Advertising		Website, online ads, business cards, signage, promotional items
9	Car and truck expenses (from Vehicle section)		- Calculated below from business miles + parking & tolls
10	Commissions and fees		Platform/merchant fees, sales commissions, booking fees
11	Contract labor		Payments to independent contractors (we may need to file 1099-NEC — bring W-9s)
13	Assets purchased (equipment, computers, furniture)		List items over \$2,500 separately with date purchased — we'll compute depreciation / Sec. 179
14	Employee benefit programs		Health/benefit plans for employees (not yourself)
15	Insurance (other than health)		Business liability, professional/E&O, property insurance
16a	Interest — mortgage (business property)		Paid to banks on real property used in the business (Form 1098)
16b	Interest — other		Business loans, business credit card interest
17	Legal and professional services		Attorney, CPA, bookkeeping, tax prep fees for the business
18	Office expense		Postage, printer ink, software subscriptions, small office items
19	Pension & profit-sharing plans (employees)		Contributions for employees only — your own SEP/Solo 401(k) goes below
20a	Rent — vehicles, machinery, equipment		Equipment leases, rented tools/vehicles
20b	Rent — other business property		Office, studio, storage, booth rent (not your home)
21	Repairs and maintenance		Repairs to business equipment or property (not improvements)
22	Supplies		Materials and supplies used in your work, not inventory
23	Taxes and licenses		WA B&O tax, city business license, employer payroll taxes, permits (not income tax)
24a	Travel (overnight, away from home)		Airfare, lodging, rental car, taxis while traveling for business
24b	Business meals — enter FULL amount paid		Generally 50% deductible — we apply the limit in the total. Keep receipts noting who & purpose
25	Utilities		Business phone/cell (business %), internet (business %), utilities at business location
26	Wages (W-2 employees, not yourself)		Gross wages per payroll reports (Gusto/QuickBooks, Form W-3)
27b	Other expense:		Type a description in the yellow box (e.g., bank fees, dues & subscriptions, education, uniforms)
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VEHICLE INFORMATION (Part IV) — standard mileage method

	Description	Amount	Notes
43	Date vehicle placed in service for business		Vehicle make/model & year:
44	Total miles driven in 2026 (all purposes)		Odometer Dec 31 minus Jan 1
44b	Commuting miles		Home to regular work location — not deductible
44a	Business miles Jan 1 – Jun 30		From your mileage log (app or written)
	IRS rate Jan 1 – Jun 30, 2026 (\$/mile)	\$0.725	IRS 2026 standard business rate
44a	Business miles Jul 1 – Dec 31		From your mileage log
	IRS rate Jul 1 – Dec 31, 2026 (\$/mile)	\$0.760	IRS midyear increase effective July 1, 2026
	Business parking fees and tolls		Deductible in addition to mileage
9	Car & truck expense (calculated)		-

Tracking actual vehicle costs (gas, repairs, insurance, loan interest) instead? Bring those totals and let us know.

HOME OFFICE (Line 30) — area used regularly & exclusively for business

	Description	Amount	Notes
	Square feet of office space		Must be used regularly and exclusively for business
	Total square feet of home		
	Home expenses: rent or mortgage interest + property tax		Annual totals — we'll choose the better of actual vs. simplified (\$5/sq ft, max 300 sq ft)
	Home expenses: utilities, insurance, HOA, repairs		Annual totals for the whole home

OTHER TAX INFORMATION (reported elsewhere on your return)

	Description	Amount	Notes
	Federal estimated tax payments made for 2026		List dates & amounts paid (Q1–Q4) on a separate note if possible
	Self-employed health insurance premiums		Medical, dental, vision for you/spouse/dependents, if not eligible for an employer plan
	Your own retirement contributions (SEP-IRA, Solo 401(k), SIMPLE)		Include amounts made or planned before the filing deadline

SUMMARY (calculated)

	Description	Amount	
7	Gross income		-
28	Total expenses (meals at 50%)		- Excludes line 13 assets and home office — we'll compute those
31	Estimated net profit (loss) before home office & depreciation		-

PLEASE ALSO BRING

All Forms 1099-NEC, 1099-MISC, 1099-K received • Business bank & credit card statements (Dec 2026)

Mileage log • Receipts for asset purchases • W-9s / 1099s for contractors you paid \$600+ (2026)

WA B&O excise tax returns filed for 2026 • Payroll reports (if you have employees) • Prior-year return (new clients)

WHEN DONE: Save this file as `LastName_ScheduleC_2026.xlsx` and send it to us through our secure client portal, or print it and bring it with your documents. Please do not email SSNs or bank account numbers.

Client signature: _____ Date: _____ I confirm the information above is complete and accurate to the best of my knowledge.