

COMMUNITY ACTION DULUTH

FREE TAX SITE

SELF-EMPLOYMENT TAX ORGANIZER

20____ Tax Year, 2019 Tax Prep and Filing Season

Thank you for choosing Community Action Duluth (CAD) to prepare your tax return. Our trained and certified volunteers are committed to providing you with the highest quality of tax preparation. To help us meet this goal, please read the following carefully before completing this Self-Employment Tax Organizer. Business owners must be Sole Proprietors only.

*Please note: we do **NOT** prepare taxes for people who have rental property income.*

- Income guidelines are \$56,000 or less of total household income for the tax year.
- **Certain CAD volunteers are qualified to handle self-employment income that can be reported on the Schedule C.** We are unable to assist customers with corporate/limited liability companies, a business with paid employees other than the taxpayer, a business loss or more than one business (requiring separate Schedules C). Note: See page 2 for other limitations to preparation that may also apply.
- **Please complete the Self-Employment Tax Organizer before coming to a walk-in tax clinic.** We cannot prepare your tax return if you are missing any information or documentation. We will prepare your tax return but we are unable to do your business accounting. Use the Tax Organizer to total your business income in each Part I category and your business-related expenses in each Part II category. **See Page 2 for walk-in tax clinic schedule.**
- Not all sections of the Self-Employment Tax Organizer may apply to your work activities. Complete the sections that best show your expenses.
- You must have supporting documentation such as mileage logs, invoices, receipts, deposit slips, cancelled checks, check registers, bank and/or credit card statements to prove your expenses, but you do not need to bring the documents to your appointment or meeting with CAD volunteers.
- If prior tax return(s) included self-employment income or Schedule A itemized deductions, please bring copies of any such return(s) to your appointment with CAD.
- Bring your social security card (or ITIN card or letter) for yourself and all dependents on the tax return. Bring supporting documents for all other household income.

Contact Information for questions or appointments (Jan 31 – Apr 11, Apr 30 – Jun 26, 2019):

Julia Cheng, Tax Site Program Coordinator

Phone: (218) 726-1665, ext. 225

Email: julia@communityactionduluth.org

Fax: (218) 726-1612

Address: 2424 West 5th Street, Suite 102, Duluth, MN 55806

Due to limited capacity and high demand, we ask that you bring current year returns to a walk-in clinics and thank you for your patience and cooperation. For prior year or amended returns, please schedule an appointment.

Thank you for using the tax site!

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Community Action Duluth 2019 Tax Site Schedule

**All service takes place at our main office:
2424 W. 5th St., Suite 102, Duluth, MN 55806**

Walk-in tax clinics, no appointment necessary. Current year (2018) returns only.

- Monday and Tuesday, doors open at 4:30 pm, January 28 – April 15
- Saturday, doors open at 8:45 am, February 2 – April 13

We take 24-48 customers per clinic, depending on the number of volunteers available to prepare tax returns. Customers may line up 1-2 hours before doors open to get a spot.

Appointment only clinics:

- Thursday, 12 – 4 pm, January 31 – April 11. Prior year and amended returns, current year return only as follow-up.
- Tuesday and Wednesday, 12 – 4 pm, April 30 – June 26. All returns within scope of service.

Self-Employment Scope of Service

Due to the limits of tax site training, CAD can assist small businesses with

- Business expenses under \$10,000
- Net **profit** after expenses are deducted from gross income: net **loss** is out of scope
- No home daycare
- No inventory or direct sales
- No business use of the home
- No depreciation of assets or amortization
- No cab drivers, newspaper carriers or couriers
- No clergy members
- No corporations or partnerships
- No rental income
- No businesses with employees
- No hobby or farming income
- No day trading income

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SELF-EMPLOYMENT TAX ORGANIZER, TAX YEAR _____

MAIN INFORMATION	
Type of business or profession	
Business name	
Business address	
Business telephone	
Business start date	

PART I: Income	
Form 1099(s) including 1099K	
Cash or checks	
Sales tax collected	
Prizes, awards, gifts received for direct sales of products such as Tupperware or Avon	
TOTAL GROSS INCOME	

Did you pay estimated tax payments to the IRS or State of Minnesota last year?

If yes, how much? IRS _____ State of Minnesota _____ (yearly totals)

PART II: Business Expenses			
Advertising	\$	Overnight Travel	\$
Commissions and fees	\$	Utilities (other than household)	\$
Business liability insurance	\$	Professional education	\$
Interest on business loans or business credit cards	\$	Bank charges	\$
Legal and professional fees	\$	Safety equipment and specialized clothing	\$
Office supplies	\$	Freight and postage	\$
Rent or lease of equipment & property	\$	Dues and publications	\$
Repairs and maintenance of equipment	\$	Telephone and long distance (only 2 nd line in home is allowed)	\$
Other supplies	\$	Cell phone – annual charges	\$
Business licenses	\$	Cell phone - % business use	\$

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Sales tax paid to state	\$	Other – list item Move business and self	\$
Business meals (50% deductible)	\$	Other – list item	\$

NOTES:

- **If your total self-employment expenses exceed \$10,000 or you have a net loss, you must see a professional tax preparer to complete your return.**
- **The first trip of the day from your home to your first job/client/contract and the last trip of the day to your home are considered commuting mileage and are not deductible as business mileage expense.**

PART IV: Vehicle Information	
Month/day/year your vehicle was placed in service: ____ / ____ / ____	
Business miles – Jan. 1 to June 30, 20____: _____ July 1 to Dec. 31, 20____: _____ Total Business Miles: _____	
Total commuting miles:	Total personal miles:
Parking and tolls: \$	
Was your vehicle available for personal use during off-duty hours?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do you (or your spouse) have another vehicle available for personal use?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do you have evidence to support your deduction?	<input type="checkbox"/> Yes <input type="checkbox"/> No
If yes, is the evidence written?	<input type="checkbox"/> Yes <input type="checkbox"/> No