

Gig Worker Tax Preparation Organizer (Uber / Lyft / DoorDash / Instacart)

Tax Year: _____

Client Information

Name: _____

Phone: _____ **Email:** _____

Home Address: _____

Filing Status:

- Single
 - Married Filing Jointly
 - Head of Household
 - Other: _____
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Gig Platforms Used

- Uber (Rideshare)
 - Lyft (Rideshare)
 - Uber Eats
 - DoorDash
 - Instacart
 - Grubhub
 - Shipt
 - Other: _____
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Income Summary

Uber Earnings: \$ _____

Lyft Earnings: \$ _____

DoorDash Earnings: \$ _____

Instacart Earnings: \$ _____

Other Gig Income: \$ _____

Total Gig Income: \$ _____

Please attach:

- 1099-K forms
- 1099-NEC forms
- Annual summaries from all apps
- Weekly payout reports (if available)

 **Mileage (MOST IMPORTANT SECTION)**

Total Business Miles Driven: _____ Miles

(Optional breakdown)

Uber/Lyft Miles: _____

DoorDash / Delivery Miles: _____

Instacart Miles: _____

Other Gig Miles: _____

Vehicle Expenses (ONLY if NOT using standard mileage)

Gas / Fuel: \$ _____

Oil Changes: \$ _____

Repairs & Maintenance: \$ _____

Tires: \$ _____

Car Washes / Detailing: \$ _____

Insurance: \$ _____

Lease / Loan Payments: \$ _____

Registration & Tags: \$ _____

Dash Cam: \$ _____

Phone Mounts / Accessories: \$ _____

Platform Fees & Commissions

Uber Fees: \$ _____

Lyft Fees: \$ _____

DoorDash Fees: \$ _____

Instacart Fees: \$ _____

Other Platform Fees: \$ _____

Phone, Internet & Technology

Cell Phone (Business Portion): \$ _____

Data Plan / Internet: \$ _____

GPS / Navigation Apps: \$ _____

Gig Tracking Apps (Stride, Everlance, etc.): \$ _____

Phone Accessories (chargers, mounts): \$ _____

Tolls, Parking & Delivery Costs

Tolls: \$ _____

Parking Fees: \$ _____

Airport / Pickup Fees: \$ _____

Waiting Lot Fees: \$ _____

Bridge Fees: \$ _____

Supplies (Delivery & Rideshare)

Hot Bags / Insulated Bags: \$ _____

Drink Carriers: \$ _____

Snacks / Water (Rideshare): \$ _____

Sanitizing Supplies: \$ _____

Cleaning Supplies: \$ _____

Cleaning & Maintenance

Interior Cleaning: \$ _____

Car Wash Membership: \$ _____

Vacuum / Detailing: \$ _____

Seat Covers / Floor Mats: \$ _____

Insurance

Rideshare Insurance Add-On: \$ _____

Commercial Auto Insurance: \$ _____

Business Administration

Accounting / Tax Prep Fees: \$ _____

Bank Fees: \$ _____

Office Supplies: \$ _____

Software Subscriptions: \$ _____

Assets Purchased During the Year

List major purchases (vehicle, equipment, tech upgrades)

Description Date Purchased Cost

Examples:

- Vehicle purchase
 - Dash cam system
 - Phone upgrade (business use)
 - Major vehicle repairs
 - Delivery equipment kits
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Home Office (If Applicable)

Used for scheduling, tracking, or administrative work:

Yes No

Home Square Footage: _____

Office Square Footage: _____

Rent / Mortgage Interest: \$ _____

Utilities: \$ _____

Internet: \$ _____

Repairs (Entire Home): \$ _____

Estimated Tax Payments

Federal Estimated Taxes: \$ _____

State Estimated Taxes: \$ _____

Dates Paid: _____

Platform Activity Questions

Did you use multiple gig apps regularly?

Yes No

Did you track mileage using an app (Stride, Everlance, etc.)?

Yes No

Did you receive bonuses, peak pay, or incentives?

Yes No

Did you purchase or sell a vehicle this year?

Yes No

Did you use your vehicle for personal use?

Yes No

Other Expenses

List any additional gig-related expenses:

Description	Amount
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	\$ _____
--	----------

	\$ _____
--	----------

	\$ _____
--	----------

Description Amount

\$ _____

Additional Notes

Client Certification

I certify that the information provided is complete and accurate to the best of my knowledge. I understand that supporting documentation may be required.

Client Signature: _____

Date: _____