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SELF-EMPLOYED TAX CHECKLIST

Schedule C and SE

BUSINESS / OWNER	TAX YEAR	ACCOUNTING METHOD	EIN (IF ANY)	BUSINESS CODE (NAICS)

Income records

Record	Have it	Where / notes	Amount
1099-NEC forms received (list payers below)	❑		
1099-K from payment processors	❑		
Invoices paid, not on a 1099 (from billing tracker)	❑		
Cash and other income	❑		
Refunds / returns given (negative)	❑		
Gross receipts			

Expense totals by Schedule C line (from expense tracker)

Category (line)	Have it	Where / notes	Amount
Advertising (8)	❑		
Car and truck: mileage log or actual (9)	❑		
Contract labor; 1099-NECs issued (11)	❑		
Depreciation / Section 179; asset list (13)	❑		
Insurance, business (15)	❑		
Legal and professional (17)	❑		
Office expense (18)	❑		
Rent or lease (20)	❑		
Supplies (22)	❑		
Taxes and licenses (23)	❑		
Travel (24a) and meals at 50% (24b)	❑		
Utilities, phone, internet share (25)	❑		
Other: software, subscriptions, fees (27a)	❑		
Total expenses			

Net profit before home office	

ALSO NEEDED

- ❑ Home office: square footage and expenses (Form 8829 or simplified)
- ❑ Vehicle: total miles, business miles, commuting miles, date placed in service
- ❑ Health insurance premiums paid (self-employed deduction)
- ❑ SEP-IRA, SIMPLE or solo 401(k) contributions
- ❑ Estimated tax payments: dates and amounts (Form 1040-ES)
- ❑ Inventory: opening, purchases, closing (if you sell goods)
- ❑ Assets bought or sold this year (date, cost, use %)
- ❑ State sales tax returns filed (if applicable)
- ❑ Prior-year carryovers (home office, losses)
- ❑ Bank and card statements for the year, reconciled