

SELF-EMPLOYED TAX DOCUMENT CHECKLIST

INCOME

Payments received via cash apps

1099 MISC/NEC

Employee Retention Credits
(ERTC)

WAGES PAID

Total gross wages paid

Company paid HCA

Federal unemployment paid

1099's submitted to the IRS

Workers' compensation paid

COST OF GOODS SOLD

Purchases of goods sold

Materials and supplies

Ending inventory balance

IN HOME OFFICE

Total square feet of home

Total square feet of office

Purchase price of home

Rent paid

Utilities paid

Home repairs

Home insurance

AUTO EXPENSES

Total miles driven

Total business miles driven

Lease payments

Auto insurance

Repairs and maintenance

Fuel purchased

Make and model of vehicle

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OTHER DEDUCTIONS

Advertising

Interest paid

Bank charges

Legal and professional fees

Commissions paid

Liability insurance

Contract labor paid

Meals and entertainment

Dues and subscriptions

Office supplies

Health insurance for owners

Other expenses

Health insurance for employees


Travel expenses


Insurance (other than health, auto
and liability)

Utilities



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