

Self-Employed Tax Checklist

Income, expenses, mileage, equipment and other records for independent contractors and sole proprietors.

Use this checklist if you are a freelancer, independent contractor or sole proprietor reporting Schedule C income.

PERSONAL & TAX INFORMATION

- ☐ Government-issued photo identification
- ☐ Social Security card or ITIN letter
- ☐ Prior-year tax return
- ☐ IRS Identity Protection PIN, if issued
- ☐ Estimated tax payment records

BUSINESS INCOME

- ☐ Forms 1099-NEC
- ☐ Forms 1099-K
- ☐ Forms 1099-MISC
- ☐ Cash, checks and direct-deposit income
- ☐ Payment processor reports
- ☐ Sales records or income summary
- ☐ Other business income not on a tax form

BUSINESS EXPENSES

- ☐ Advertising and marketing
- ☐ Bank and merchant processing fees
- ☐ Business insurance
- ☐ Contract labor
- ☐ Education and training
- ☐ Equipment and tools
- ☐ Legal and professional fees
- ☐ Licenses and permits
- ☐ Office expenses and supplies
- ☐ Postage and shipping
- ☐ Rent or workspace expense
- ☐ Software and subscriptions
- ☐ Telephone and internet
- ☐ Travel expenses
- ☐ Business meals
- ☐ Uniforms or protective clothing
- ☐ Other ordinary business expenses

VEHICLE & MILEAGE

- ☐ Business mileage log
- ☐ Total annual vehicle mileage
- ☐ Parking and tolls
- ☐ Vehicle purchase or lease documents
- ☐ Fuel, repairs, insurance and registration, when applicable

HOME OFFICE

- ☐ Square footage of home
- ☐ Square footage used exclusively for business
- ☐ Rent or mortgage interest
- ☐ Property taxes
- ☐ Utilities
- ☐ Homeowners or renters insurance
- ☐ Repairs related to the office area

ASSETS & EQUIPMENT

- ☐ Computers
- ☐ Furniture
- ☐ Machinery
- ☐ Vehicles
- ☐ Tools and equipment
- ☐ Purchase date and cost of each item

ADDITIONAL INFORMATION

- ☐ Health insurance premiums
- ☐ Retirement plan contributions
- ☐ Business loans and interest
- ☐ Inventory records, if applicable
- ☐ Sales tax records, if applicable
- ☐ Business-use percentage for mixed personal and business expenses

Important: Upload documents through the secure ServiAmigo client portal. Do not send Social Security numbers, identification documents, tax forms or bank information through regular email, text message or WhatsApp.