ROSS & ASSOCIATES®
TAX OFFICE
YOUR VIRTUAL/MOBILE TAX PREPARATION EXPERTS

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Self-Employed Document Checklist

For freelancers, contractors, gig workers and sole proprietors

Owner / business name

Tax year

Income & business records

- [ ] All W-2s as well as business income records if you have mixed income
- [ ] 1099-NEC, 1099-MISC, 1099-K and platform / merchant statements
- [ ] Cash, checks, transfers, tips, refunds and other receipts not on tax forms
- [ ] Profit-and-loss statement, bookkeeping reports and bank statements
- [ ] Inventory, purchases, materials and cost-of-goods records
- [ ] Business start / closure information, EIN and entity documents
- [ ] Estimated tax payments and prior-year business / depreciation schedules

Expenses & supporting records

- [ ] Advertising; commissions; contractor payments; payroll and benefits
- [ ] Business insurance; licenses; professional fees; interest; bank charges
- [ ] Rent, utilities, office expenses, supplies, subscriptions and travel
- [ ] Meals records showing business purpose; identify entertainment separately
- [ ] Equipment purchases / disposals, dates, cost and business-use records

Additional income sources / documents still needed

Report all business receipts, even when no information form is received. Identify personal portions and reimbursements for preparer review.

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Self-Employed Document Checklist

Vehicle, home office & missing-record follow-up

Vehicle & home-office records

- [ ] Mileage log showing dates, destinations, business purpose and mileage
- [ ] Total annual miles, business miles and commuting miles separately
- [ ] Vehicle purchase / lease, operating expenses and business-use changes
- [ ] Home and office area, dates used, business activity and shared-use details
- [ ] Applicable rent, utilities, repairs, insurance and ownership records

Record completeness

Business activity / services or products

How income and expenses were recorded; documents supplied

Missing records, estimates, reimbursements or questions to resolve

Use a separate business worksheet for each activity. Listing an expense does not establish deductibility. Your preparer will review the facts, records and applicable rules.