



Self-Employed Tax Preparation Checklist

The information provided in this checklist is for general informational purposes only and does not constitute tax, legal, or accounting advice. Consult directly with TrueCount Financials for guidance specific to your situation.

1. BUSINESS INFORMATION

	Legal business name & address
	Entity Type
	Employer Identification Number (EIN), if applicable
	Prior-year tax return (if available)

2. INCOME

	Form 1099-NEC / 1099-MISC
	Gross Receipts or sales summaries
	Other business income

3. EXPENSES (SCHEDULE C)

	Advertising & marketing
	Supplies & materials
	Equipment & asset purchases
	Vehicle mileage log
	Home office expenses
	Insurance
	Software or subscription
	Professional fees

4. FINANCIALS & PAYMENTS

	Business bank statements
	Business credit card statements
	Estimated tax payments
	Payroll reports (if applicable)
	1099s issued to contractors