

Tax Filing Document Checklist – Handymen (U.S.)

☐ 1. Personal Information

- Social Security Number (SSN) or ITIN
 - Government-issued ID (e.g. driver's license)
 - Last year's tax return
 - Info on spouse/dependents
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☐ 2. Income Documents

- **Form 1099-NEC / 1099-MISC** – from clients, property managers, companies
 - **Form 1099-K** – if paid via PayPal, Venmo, Cash App, or merchant platforms
 - **Cash income records** – invoices, logs, or handwritten receipts
 - Bank statements for income deposits
 - Contracts or work orders for each job
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☐ 3. Business Expenses (Schedule C deductions)

You can deduct **ordinary and necessary** business expenses. Keep receipts or logs.

- Tools and equipment (drills, saws, ladders)
 - Repairs and maintenance of tools
 - Work clothing (if branded or protective, like steel-toe boots)
 - Materials and supplies (screws, paint, caulk, etc.)
 - Vehicle expenses (gas, repairs, insurance, depreciation)
 - Mileage log (for job-related travel)
 - Business insurance
 - Cell phone (portion used for business)
 - Advertising (flyers, website, online listings)
 - Licenses and certifications
 - Subcontractor labor payments
 - Jobsite meals (within IRS limits)
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☐ 4. Other Deductible Costs

- Home office deduction (if used exclusively for admin or business)
 - Software and apps (QuickBooks, scheduling, invoicing)
 - Accountant or tax preparer fees
 - Safety gear and uniforms
 - Continuing education or trade training
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□ 5. Banking & Payment Info

- Routing and account number (for refund)
 - Payment processor records (PayPal, Zelle, Square)
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□ 6. Other Helpful Records

- Vehicle mileage log
- Job calendar or scheduling logs
- Work photos (for job verification)
- Copies of business registration or insurance

