

# 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

