Tax Filing Document Checklist – Showmen & Artists

☐ 1. Personal Information

- Social Security Number (SSN) or ITIN
- Valid government-issued ID (Driver's License or Passport)
- Previous year's tax return (optional but helpful)
- Spouse/dependent info (if applicable)

☐ 2. Income Documents

- **Form W-2** – from theater companies, production houses, agencies
- **Form 1099-NEC / 1099-MISC** – from gigs, freelance work, venues, promoters
- **Form 1099-K** – if paid via PayPal, Cash App, or ticketing platforms
- **Form 1099-INT / 1099-DIV** – if you earn interest/dividends
- **Form 1099-G** – if you received unemployment or state benefits
- **Royalty statements** – for music, art, digital content
- Contracts/invoices for unpaid gigs or cash work
- Grants or artist residency stipends

☐ 3. Business-Related Expenses

Reported on **Schedule C** (if self-employed):

- Travel for performances or exhibitions (airfare, lodging, mileage, meals)
- Costumes, stage wear, makeup, props
- Musical instruments, gear, art supplies
- Marketing (website, business cards, ads)
- Studio rent, rehearsal space, storage fees
- Union dues, agent/manager commissions
- Software for editing, design, or booking
- Professional development (acting classes, music workshops)
- Home office (if used exclusively for work)
- Phone/internet percentage used for business
- Insurance (instrument, liability, or business insurance)

☐ 4. Business Records & Proof

- Receipts/invoices for equipment or expenses
- Travel logs or calendar of performances
- Copies of contracts or performance agreements
- Mileage log (for vehicle use related to work)
- Bank/credit card statements for business expenses
- Proof of grant or fellowship usage

☐ 5. Deductible Contributions & Credits

- Retirement contributions (IRA, SEP IRA)
- Health insurance premiums (if self-employed)
- Education expenses (1098-T)
- Student loan interest (1098-E)
- Charitable donations (if itemizing)

☐ 6. Direct Deposit & Banking

- Bank account and routing number for refunds
- PayPal/Venmo/Cash App reports (if used for business income)