

I'm Self-Employed



Document Collection

- ☐ **Personal Identification:** Have your driver's license or state ID ready.
- ☐ **Social Security Cards:** For yourself and any dependents.
- ☐ **All 1099 Forms:** This includes 1099-NEC, 1099-MISC, 1099-INT, and any other 1099 variants received.
- ☐ **Income Records:** Document all income, including cash, checks, and electronic transfers.
- ☐ **Bank Statements:** For verifying income and tracking expenses.
- ☐ **Expense Receipts:** All receipts for business-related expenses.
- ☐ **Mileage Log:** If using a vehicle for business, maintain a log of business-related travel.
- ☐ **Healthcare:** Form 1095-A or 1095-B

Taxpayer Intake Forms

- ☐ **Complete the Intake Form:** [Access the Form](#)
- ☐ **Mobile App for Convenience:**
 - **Android:** [Google Play](#)
 - **iOS:** [App Store](#)
- ☐ **Expenses or Home Office Deductions?**
Complete the [Schedule C Intake Form](#)

Extra Forms

- ☐ **Are You a Student?** Include 1098-T for tuition, 1098-E for student loan interest.
- ☐ **Household Employer?**
[Access the Form](#)
- ☐ **Provided Household Help?**
[Access the Form](#)
- ☐ **Have Dependents in Someone's Care?**
Complete the [Dependent Care Form](#) for deductions.

Notes

Don't forget to share our services with your friends and family. Ask us about our referral program and get \$75 per referral!

