

Required Documents

- Social Security Cards or Individual Taxpayer Identification Number (ITIN) Cards/Letters for each person on the tax return
- Photo I.D. for taxpayer and spouse (if applicable)
- 1095-A, if taxpayer purchased health insurance through Access Health CT
- If filing jointly, spouse must be present to sign e-file paperwork

Income

- 1099-NEC
- 1099-K
- Total of Income not reported on those forms, such as cash payments
- Portal information from apps such as Uber and Lyft

Expenses

- Advertising
- Car and Truck Expenses
 - Type of Vehicle: _____ Year Placed in Service: _____
 - Business Miles: _____ Commuting Miles: _____
 - Other Mileage: _____
- Insurance (Other than health)
- Legal or Professional Services
- Repairs and Maintenance Supplies
- Taxes and Licenses
- Travel, meals, and entertainment
- Utilities (Phone for business purposes)
- Other

Estimated Tax Payments

- Total amount paid in estimated tax payments

Due to IRS regulations, IRS-Certified volunteers cannot prepare returns with the following characteristics:

- Business income with a net loss
- Vehicle expenses reported as actual income
- Contract labor
- Expenses over \$35,000
- Expenses for employees
- Business use of home

Self Employment Tax Document Checklist

SimplifyCT
Serving CT Families

- Casualty losses
- Rental properties, including AirBNB
- Income from controlled substances, such as marijuana
- Cost of goods sold (inventory)
- Return and allowances