Self Employment Tax Document Checklist

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Required Documents

- ❏ Photo ID (driver's license, state photo ID or other government issued identification that includes a photo)
- ❏ Social Security Cards or Individual Taxpayer Identification Number (ITIN) Cards/Letters for each person on the tax return
- ❏ 1095-A, if taxpayer purchased health insurance through Access Health CT
- ❏ Copy of 2024 Tax Year Return,
- ❏ Bank account number and routing number for direct deposit

*** *If Married Filing Jointly, spouse **must** be present to sign e-file authorization form*

Self-Employment Income

- 1099-NEC
- 1099-K
- 1099-MISC
- Any other Income Documents - W2, 1099-R, SSA-1099, etc.
- Total of Income not reported on those forms, such as cash payments
- Portal information from apps, if worked as an Uber and/or Lyft driver

Business Information, If Any

Business Name, If Any _____

Business Address, If Any _____

_____

Federal EIN, If Any _____
(Federal Employer ID Number)

Total Gross Income _____

Retail Businesses ONLY:

Beginning Inventory _____

Merchandise Purchased for Resale _____

Cost of labor _____
(Do not include $'s paid to yourself)

Materials & Supplies _____

Other Direct Sales Costs _____

Ending Inventory _____

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All Businesses Expenses:

Advertising	
Car and truck expenses - Fill Out the Information below ❑ Type of Vehicle: _____ Year Placed in Service: _____ ❑ Business Miles: _____ Commuting Miles: _____ ❑ Other Mileage: _____	
Commissions and fees	
Contract labor (1099's Issued, If any)	
Insurance (other than health)	
Health Insurance	
Interest (see instructions): a) Mortgage (paid to banks, etc.) b) Other	
Legal and professional services	
Office Expenses	
Pension and profit-sharing plans	
Rent or lease of vehicles, machinery, and equipment	
Rent or Lease of Office Space	
Repairs and maintenance	
Supplies (not included in Retail Info)	
Taxes and licenses	
Travel (Do not include meals)	
Deductible meals	
Utilities	
Wages (less employment credits)	
Other Expenses:	

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
- Casualty losses
- Rental properties, including AirBNB
- Income from controlled substances, such as marijuana
- Expenses over $35,000
- Expenses for employees
- Business use of home
- Cost of goods sold (inventory)
- Return and allowances