



Self-Employed & Single-Member LLC Checklist

Use this checklist to gather the documents needed to prepare your tax return.

Business Information

- Business Name (if applicable)
- EIN (if applicable)
- Prior Year Tax Return (New Clients)
- Business Address

Income

- 1099-NEC Forms
- 1099-K Forms (PayPal, Venmo, Cash App, Stripe)
- Business Income Records
- Invoices or Sales Records
- Any Other Income Documents Received

Business Expenses

- Advertising & Marketing Expenses
- Office Supplies
- Professional Fees & Subscriptions
- Insurance Premiums
- Telephone & Internet Expenses
- Rent or Lease Payments
- Equipment & Software Purchases

Vehicle Expenses

- Business Mileage Records
- Vehicle Loan Interest (if applicable)
- Vehicle Registration Fees (if applicable)

Home Office

- Square Footage of Home Office
- Utility Expenses (if applicable)
- Rent or Mortgage Information

Additional Tax Information

- Estimated Tax Payments Made
- Business Asset Purchases
- IRS or State Tax Notices
- Any Other Tax-Related Documents

Important: Please provide all tax documents and business records, even if you are unsure whether they are needed for your return.