

SELF-EMPLOYMENT / SINGLE-MEMBER LLC CHECKLIST

Business Information

- ☐ Business Name
- ☐ DBA (Doing Business As), if applicable
- ☐ Business Address
- ☐ Business Phone Number
- ☐ Business Email
- ☐ EIN (if applicable)
- ☐ Principal Business Activity
- ☐ Business Start Date

Income Documents

- ☐ Form 1099-NEC
- ☐ Form 1099-K
- ☐ Form 1099-MISC
- ☐ Gross receipts not reported on a 1099
- ☐ Sales reports
- ☐ Invoices issued
- ☐ Bank statements
- ☐ Other business income
- ☐ Square, Stripe, PayPal, Venmo, Zelle, or
Other Payment Processor Statements
- ☐ Sales Tax Reports (if applicable)

Home Office (If Applicable)

- ☐ Total Square Footage of Home
- ☐ Square Footage Used Exclusively for Business
- ☐ Mortgage Interest
- ☐ Rent Payments
- ☐ Property Taxes
- ☐ Homeowners/Renters Insurance
- ☐ Utilities
- ☐ Repairs & Maintenance
- ☐ HOA Fees

Business Expenses

- ☐ Completed Business Expense Worksheet
- ☐ Profit & Loss Statement (if available)
- ☐ Accounting Reports (QuickBooks, Xero, etc.)
- ☐ Business Bank Statements
- ☐ Business Credit Card Statements

Vehicle Information

- ☐ Vehicle Make, Model & Year
- ☐ Date Vehicle Placed in Service
- ☐ Total Vehicle Miles
- ☐ Business Miles
- ☐ Commuting Miles
- ☐ Personal Miles
- ☐ Vehicle Loan Interest
- ☐ Vehicle Registration Fees
- ☐ Parking & Tolls

Assets & Equipment Purchases

- ☐ Computers
- ☐ Office Furniture
- ☐ Machinery & Equipment
- ☐ Vehicles Purchased for Business
- ☐ Software Purchases
- ☐ Date Purchased
- ☐ Purchase Price
- ☐ Financing Information

Business Assets Sold or Disposed Of

- ☐ Description of Asset
- ☐ Date Acquired
- ☐ Date Sold
- ☐ Sale Price

Retirement Contributions

- ☐ SEP IRA Contributions
- ☐ SIMPLE IRA Contributions
- ☐ Solo 401(k) Contributions

Additional Information

- ☐ Business Loan Information
- ☐ State or Local Business Tax Payments
- ☐ Business Licenses Renewed
- ☐ Any IRS or State Notices Received
- ☐ Foreign Business Income or Accounts
- ☐ Estimated Tax Payments Made
- Health Insurance Premiums Paid for Self-Employed Coverage

Important: Please provide all business income records, expense documentation, bank statements, and tax forms, even if you are unsure whether they are needed for your return. Providing complete information helps ensure accurate tax preparation and may identify deductions, credits, or reporting requirements that might otherwise be overlooked.