1099 or Self Employed Check List

Name and Type of Work:

# 1099s or income total

[ ]  1099s (any 1099s issued for reported income)

[ ]  Income Total for non-1099 income.

[ ]  Our office forms

[ ]  **1095-A If Covered CA insurance. If no Covered CA, please provide 1095-B or 1095-C**

# Expenses

[ ]  Please provide an itemized and totaled list of expenses. (We do not calculate expenses unless you are an office Bookkeeping client)

Expense Examples:

[ ]  Office Supplies

[ ]  Meals

[ ]  Telephone

[ ]  Internet

[ ]  Software-Supplies-Training

[ ] ECT.

Expenses would be anything that was purchased or used for the sole purpose of running your business and generating income.

# Business owners-llc, sCORP OR cORP.

[ ]  Income total and/or 1099s

[ ]  Entity filing paper work (Articles of Organization, Articles of Information, EIN and State ID) all that apply to your Entity.

[ ]  Expense listing and totals

[ ]  K1 (if one is issued for your taxes)

[ ]  Mileage totals: Personal total and Business total.

[ ]  Prior year tax return if new client.

# Additional Items if applicable

[ ]  1098-T for qualifying education

[ ]  IRA/HSA forms

[ ]  Social Security payment forms

[ ]  Student loan interest

[ ]  Securities Sale Forms

[ ]  Prior year tax return if new client and long form.

***ALSO ITEMS LISTED ON GENERAL CHECK LIST MAY APPLY PLEASE VIEW BOTH.***

***\*\*INDICATE WHAT IS INCLUDED AND SUBMIT CHECK LIST WITH FORMS\*\****