



Checklist - Schedule C (Self-Employment Income)

Use this checklist to gather all the necessary documents and information needed to prepare your Schedule C (Profit or Loss from Business) tax return.

Income Documentation:

- - 1099-NEC or 1099-K forms received
- - Records of all income received (including cash or app payments like Zelle, Venmo, CashApp, etc.)
- - Invoices issued (if applicable)

Expense Documentation:

- - Receipts or invoices for purchases related to your business
- - Business mileage log or odometer readings
- - Bank and credit card statements (business-related)
- - Proof of home office use (square footage, rent/mortgage, utilities, etc.)
- - Internet and phone bills used for business
- - Advertising and marketing costs
- - Business insurance or licenses
- - Business-related education or certifications

Additional Information:

- - Date business started (or confirmation if it's ongoing)
- - Business name (if any) and type of service or product provided
- - Any subcontractors paid (include amounts and Form 1099s issued to them)
- - Estimated taxes paid during the year (if any)