

Self-Employed Business Checklist

Business Info

If you are new to Tax Guy or have started a new business, please provide the following applicable information:

Business Activity/Profession: _____

Business Name: _____

Business Address: _____

Business EIN: _____

Income

☐ Please provide any 1099s received (1099-MISC, 1099-NEC, 1099-K)

Total Income for the tax year: _____

Returns or allowances: _____

Income (continued)

Does your business keep inventory? If yes, please complete the following:

Total inventory at the beginning of the year: _____

Total purchases of inventory throughout the year: _____

Cost of labor (if manufacturing inventory): _____

Cost of materials and supplies (if manufacturing inventory): _____

Total inventory at the end of the year: _____

Expenses

Do you have any employees? _____

Do you have an office in your home? _____

Do you have any business property (vehicles, equipment, building, etc.)? _____

Advertising: _____

Contract labor: _____

Insurance: _____

Interest:

Mortgage: _____

Other: _____

Legal and professional services: _____

Office expense: _____

Expenses (continued)

Rent or lease:

Vehicles, machinery, and equipment: _____

Other business property: _____

Repairs and maintenance: _____

Supplies: _____

Taxes and licenses: _____

Travel and meals:

Travel: _____

Deductible meals: _____

Utilities: _____

Other Expenses (please give a brief description and the amount):
