



Self-Employed and Business: What to Gather

A general starting checklist for self-employed and small-business tax returns.

- ☐ Legal entity name, EIN, business address, and ownership percentage
 - ☐ Prior-year business tax return, if available
 - ☐ Income records (1099-NEC, 1099-K, invoices, bank deposits)
 - ☐ Business expense records (receipts, statements, mileage log)
 - ☐ 1099s you issued to contractors
 - ☐ Forms W-2 and W-3 or quarterly payroll filings, where applicable
 - ☐ Payroll records, if you have employees
 - ☐ Major equipment and vehicle purchases, and asset-disposal records
 - ☐ Vehicle use records, if claiming mileage or vehicle expenses
 - ☐ Inventory records, where applicable
 - ☐ Loans and business-credit-card statements, where applicable
 - ☐ Retirement-plan and business health-insurance records
 - ☐ Home office details, if applicable
 - ☐ Bookkeeping records or QuickBooks file
 - ☐ Estimated tax payments made during the year
 - ☐ Ownership, address, or entity changes during the year
 - ☐ Any IRS or state tax notices received
-

Please note: This is a general starting list, not tax advice for a specific situation. TaxMart will provide a customized request after learning about your needs. **Do not email Social Security numbers, banking details or tax documents** unless TaxMart has given you approved secure instructions.