Tax Document Checklist: Self-Employment

Required Documents
 □ Social Security Cards or Individual Taxpayer Identification Number (ITIN) Cards/Letters for each person on the tax return □ Photo I.D. for taxpayer and spouse (if applicable) □ 1095-A, if taxpayer purchased health insurance through Connect for Health Colorado □ If filing jointly, spouse must be present to sign e-file paperwork
ncome ☐ 1099-NEC ☐ 1099-K ☐ Total of Income not reported on those forms, such as cash payments ☐ Portal information from apps such as Uber and Lyft
Advertising Car and Truck Expenses Supplies Repairs and Maintenance Supplies Travel, meals, and entertainment Utilities (Phone for business Advertising Year Placedin Service: Commuting Miles: Commuting Miles: Commuting Miles: Tommuting Miles: Tommuting Miles: Tommuting Miles: Tommuting Miles: Commuting Miles: Tommuting Miles: T
Estimated Tax Payments ☐ Total amount paid in estimated tax payments

Due to IRS regulations, IRS-Certified volunteers <u>cannot</u> prepare returns with the following characteristics:

- Business income with a net loss
- Expenses over \$35,000
- Vehicle expenses reported as actual income
- Expenses for employees
- Contract labor
- Business use of home
- Casualty losses
- Cost of goods sold (inventory)
- Return and allowances
- Rental properties, including AirBNB
- Income from controlled substances, such as marijuana



