



Tri-Unity Tax & Business Services

Self-Employed Tax Checklist & Planning Guide

You can use this year-round guide to track potential tax deductions and note details for your tax preparer and expenses. Keep receipts and remember not all deductions apply to every business.

Advertising & Marketing

- ☐ Website domain, hosting, design, and maintenance
- ☐ Social media ads (Instagram, Facebook, Google, Apps)
- ☐ Influencers, content creators, podcasts, YouTube promotions
- ☐ Printed marketing (business cards, flyers, banners, brochures)
- ☐ Sponsorships, promotions, and surveys
- ☐ Video and hosting platforms (Zoom, Skype, etc.)

Notes:

Legal, Accounting & Professional Fees

- ☐ Accounting and bookkeeping services
- ☐ Tax preparation and planning fees
- ☐ Legal consultations and compliance services
- ☐ Business coaching, mentoring, and consulting
- ☐ Professional dues, licenses, certificates and accreditation fees

Notes:

Office Expenses & Supplies

- ☐ Office supplies and business materials
- ☐ Computer, laptop, tablet, or electronics
- ☐ Printer, ink, paper, and filing supplies
- ☐ Business phone and communication plans
- ☐ Internet and landline (business portion)
- ☐ Uniforms or branded business apparel

Notes:

Education & Training

- ☐ Business-related courses and online classes
- ☐ Seminars, workshops, webinars, and conferences
- ☐ Books, subscriptions, and trade publications
- ☐ Education-related travel and meals

Notes:



Travel, Meals & Entertainment

- ☐ Business meals with clients or networking events
- ☐ Conference and event meals
- ☐ Airfare, lodging, car rental, and transportation
- ☐ Mileage, parking, and tolls
- ☐ Other business-related travel expenses

Notes:

Vehicle & Transportation Expenses

- ☐ Business mileage (tracked with app or log)
- ☐ Auto fuel, oil, repairs, and routine maintenance
- ☐ Auto insurance, registration and renewals
- ☐ Vehicle loan interest or lease payments

Notes:

Home Office Deduction

- ☐ Home office square footage
- ☐ Rent or mortgage interest and property taxes (business portion)
- ☐ Renters insurance and casualty losses
- ☐ Utilities (electric, water, gas, internet)
- ☐ Maintenance (trash, security monitoring, landscape and repairs & renovations for home office only)
- ☐ Homeowners insurance and HOA fees
- ☐ Office furniture and workspace setup

Notes:

Equipment & Depreciation

- ☐ Machinery and business equipment
- ☐ Office furniture and fixtures
- ☐ Software, apps, and technology tools
- ☐ Vehicles used for business purposes
- ☐ Section 179 or bonus depreciation eligible items

Notes:

Employees, Contractors & Insurance

- ☐ Employee wages and payroll taxes
- ☐ Independent contractor payments
- ☐ Workers' comp and liability insurance
- ☐ Employee benefits, bonuses, and gifts
- ☐ Retirement contributions (401k, IRA, SEP)

Notes:



Banking, Fees & Other Expenses

- ☐ Bank service fees and interest
- ☐ Merchant and payment processing fees
- ☐ Licenses, permits, and renewals
- ☐ Postage, shipping, and courier services
- ☐ Security, cleaning, and maintenance services
- ☐ Cost of goods sold (materials and labor)

Notes:

★ Bonus: Commonly Overlooked Small Business Write-Offs

- ☐ Startup and business formation costs
- ☐ Home office and business-use vehicle expenses, including insurance
- ☐ Business use of a personal cell phone
- ☐ Business interest paid on auto loans, credit cards and loans
- ☐ Business bad debt from uncollected invoices for goods or services
- ☐ Business meals and client gifts (within IRS limits)
- ☐ Business insurance premiums and retirement plan contributions
- ☐ Mileage for local and routine business travel
- ☐ Bank service charges, ATM fees and merchant processing fees
- ☐ Software subscriptions, memberships, and business-related applications
- ☐ Education, training, and professional development expenses
- ☐ Depreciation of business equipment and qualifying home improvements (business use required)

Notes:
