



## 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.

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#### 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:

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#### 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:

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#### 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:

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#### Education & Training

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

Notes:

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#### 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:

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#### 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:

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#### 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:

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#### 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:

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#### 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:

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## 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: