

Schedule C Tax Document Checklist

Personal Information

- Driver's License / State ID
- Social Security Number (SSN) or Individual Taxpayer Identification Number (ITIN)
- Spouse's information (if filing jointly)

Business Information

- Legal Business Name
- EIN (if applicable)
- Business Address
- Business Start Date
- Business Type / Industry
- Business Bank Account Statements

Income Documents

- 1099-NEC / 1099-K Forms
- Sales Invoices or Sales Records
- Payment Processor Statements (PayPal, Stripe, etc.)
- Other Income Documentation

Expense Records (with Receipts / Proof of Payment)

- Advertising & Marketing
- Office Supplies & Software
- Rent (Office or Storage Space)

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- Utilities (Phone, Internet, etc.)
- Insurance (Business)
- Legal & Professional Fees
- Bank & Credit Card Fees
- Travel & Meals (Business-related)
- Vehicle Expenses (Mileage Log or Actual Expenses)
- Education & Training
- Wages Paid (if any)
- Contract Labor (1099s issued to contractors)
- Other Business Expenses

Assets & Loans (if applicable)

- Equipment Purchases (Date, Amount, Proof)
- Vehicle Purchases (Date, Amount, Proof)
- Loan Agreements (Business Loans or Lines of Credit)

Other Documents (if applicable)

- Home Office Deduction Details
 - Square Footage of Home and Office Space
 - Home Utilities & Expenses
- Health Insurance (if self-employed)
- Retirement Contributions (SEP IRA, Solo 401(k))
- Prior Year Tax Return (for reference)