1099 or Self Employed Check List

Name and Type of Work:

# 1099s or income total

1099s (any 1099s issued for reported income)

Income Total for non-1099 income.

Our office forms

**1095-A If Covered CA insurance. If no Covered CA, please provide 1095-B or 1095-C**

# Expenses

Please provide an itemized and totaled list of expenses. (We do not calculate expenses unless you are an office Bookkeeping client)

Expense Examples:

Office Supplies

Meals

Telephone

Internet

Software-Supplies-Training

ECT.

Expenses would be anything that was purchased or used for the sole purpose of running your business and generating income.

# Business owners-llc, sCORP OR cORP.

Income total and/or 1099s

Entity filing paper work (Articles of Organization, Articles of Information, EIN and State ID) all that apply to your Entity.

Expense listing and totals

K1 (if one is issued for your taxes)

Mileage totals: Personal total and Business total.

Prior year tax return if new client.

# Additional Items if applicable

1098-T for qualifying education

IRA/HSA forms

Social Security payment forms

Student loan interest

Securities Sale Forms

Prior year tax return if new client and long form.

***ALSO ITEMS LISTED ON GENERAL CHECK LIST MAY APPLY PLEASE VIEW BOTH.***

***\*\*INDICATE WHAT IS INCLUDED AND SUBMIT CHECK LIST WITH FORMS\*\****