

File your IRS Taxes Checklist

1

Personal
Income

-
-
-
-
- Complete Business Income Section

- Enter 1099-NECs + 1099-MISCs
- Enter 1099-Ks*
- Enter "Other Payments"
- Add Biz Deductions
- Add Biz Mileage
- Add Home Office

2

Health Insurance

-

3

Deductions
and Credits

- Check for Standard or Itemize
-
-
-
-
- Enter Estimated Quarterly Tax Payments

IF Itemizing:

-
-
-

4

Review

-

5

Submit

- Sign and submit
- Pay / Set up Payment Plan / Arrange for Refund

6

Finish Strong!

- Download 1040 form
- Store your documents - see page 2
- Reward
- Reflect and Revise

Store your Documents

- 1040 Form
- Personal Income - w-2, 1099-INTs, 1099-DIVs
- Personal Deductions -
- Business Info
- Essential Numbers
- Income Record
- 1099-s received
- Expense Record
- Receipts and/or Bank Statements
- 1099-s sent
- Evidence of EQ\$ sent in
- Notes
-
- Health Insurance Form
-
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HIGH FIVES!