


file! with a Tax Pro

Checklist + tips to help with the Self-Employment Section of your IRS Tax Return

This checklist covers the basics that are related to Self-Employment—Schedule C, SE, and a few lines on the 1040. The checklist does NOT include steps to complete the entire 1040 form. It's possible that you might have a few additional details to add, or issues to explore. Hopefully, getting the basics all done will make it easier to figure out the rest.

- Gather**
- Essential Numbers Worksheet
 - All 1099-NECs + 1099-MISCs - *for your biz*
 - All 1099-Ks
 - If amount on 1099-K overlaps with other 1099s, make a note to share with Tax Preparer
 - Home Office - If Actual Cost, then include all bills for the home - mortgage, rent, utilities
 - Car Info - If the first year, be ready with Make + Model, Purchase Year, Purchase cost
 - Health Insurance Premiums - if paid for from Self-Employed Income
 - Questions
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- Tax Pro**
- In Person**
- Take everything that you've gathered
 - Be ready with your list of questions
 - Optional - Ask for tips or strategies for the next year

 *Note: if you're working with someone who's NOT an accountant/CPA—such as a volunteer at the library, or a person at H&R Block—it's important to note that (usually) their main job is to help you complete the forms. They may not be able to give advice, or find additional deductions for you.*

- Tax Pro**
- Usually ~ You will be asked to:*
- Via Portal or The Mail**
- Submit your documents—via a web portal or snail mail
 - Fill out a questionnaire, which will ask you about all the figures you've collected
Note: They might ask in a different order than how we prepared
 - ProTip: Ask if you can upload your Essential Numbers worksheet instead of going through their questionnaire*
- Then ~
- Ask any questions that you've collected. Don't be shy!
 - Optional: ask for feedback or tips for next year.
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- Woohoo! Well done! Celebrate this awesome step!
- Stand by for further questions...