

collect stuff

with Jenny Girl Friday

notes

For this step ... we're just collecting stuff. No need to add anything up.

Use this menu as a prompt - not everything will apply to you. Just collect what does.

Container	<input type="checkbox"/>	Pick a cute basket or tray - or clear out a drawer - for all these items
Expenses	<input type="checkbox"/>	Expense Record or Report <i>IF you have this - via Quickbooks, Excel, or another record, print</i>
	<input type="checkbox"/>	Bank Statements <i>For all accounts used for business expenses</i>
	<input type="checkbox"/>	Credit Card Statements <i>For all accounts used for business expenses</i>
	<input type="checkbox"/>	Paper Receipts <i>For business expenses</i>
	<input type="checkbox"/>	Email Receipts <i>For business expenses, print or put into one folder</i>
		<i>Utilities used fully or partially for business:</i>
	<input type="checkbox"/>	Cell Phone Bills <input type="checkbox"/> other: _____
	<input type="checkbox"/>	Wi-Fi Bills <input type="checkbox"/> other: _____
Income Record	<input type="checkbox"/>	Any 1099-NECs, 1099-MISCs <i>For this business</i>
	<input type="checkbox"/>	Any 1099-Ks
	<input type="checkbox"/>	Record(s) of Sales <i>If you have this in Excel, Quickbooks, a commerce website or some other application, print</i>
		<i>OR, if you need to construct a record ... choose what applies to you:</i>
	<input type="checkbox"/>	Deposit Slips
	<input type="checkbox"/>	Customer Invoice copies
	<input type="checkbox"/>	Calendar of Appointments
Mileage + Office	<input type="checkbox"/>	Mileage Record <i>If from an APP, download and print</i>
	<input type="checkbox"/>	Starting Odometer Reading <i>January 1st ~ or close estimate</i>
	<input type="checkbox"/>	Ending Odometer Reading <i>December 31st ~ or close estimate</i>
	<input type="checkbox"/>	Home Office Square Feet
EQ\$	<input type="checkbox"/>	Find records of any estimated quarterly tax payments made to the IRS <i>Not sure? Check bank statements, credit card statements. If necessary, call the IRS.</i>