



WHAT DO I NEED TO BRING TO MY TAX APPOINTMENT? (SELF-EMPLOYED)

PERSONAL INFORMATION	DEDUCTIONS (GENERAL CONT'D)
<input type="checkbox"/> Social Security card(s)	<input type="checkbox"/> Information related to use of home office (if applicable)
<input type="checkbox"/> Driver's License(s)	<input type="checkbox"/> Commissions paid
<input type="checkbox"/> Dependents' Social Security numbers and dates of birth*	<input type="checkbox"/> Contract Labor (1099-Misc needs to be printed if contractor is paid over \$600)
<input type="checkbox"/> Last year's Federal and State tax return (new clients only)	<input type="checkbox"/> Health insurance premiums - special rules apply.
HEALTH INSURANCE	<input type="checkbox"/> Office Supplies
<input type="checkbox"/> Form 1095-A (Health Insurance Marketplace Statement)** OR Exemption Certificate Number***	<input type="checkbox"/> Business Liability Insurance, Business License & Corporation Fees
INCOME	<input type="checkbox"/> Rent/lease of business equipment or storage facilities
<input type="checkbox"/> Self-employment business income and expenses/1099-MISC*/1099K	<input type="checkbox"/> Rent or lease of business space
<input type="checkbox"/> Proof Of Income (Receipt Book, Bank Statements, or other form of proof)	<input type="checkbox"/> Maintenance and repairs of equipment or business space
BUSINESS DOCUMENTS	<input type="checkbox"/> Business mortgage and property taxes
<input type="checkbox"/> Form SS-4 (Tax ID Number)	<input type="checkbox"/> Business travel - conference registration fees, hotel, parking, air and bus fares, taxis
<input type="checkbox"/> Business License	<input type="checkbox"/> Cell Phone, Fax and Internet Charges
<input type="checkbox"/> Certificate of Organization (LLC, C-Corp, S-Corp) *	<input type="checkbox"/> Web site hosting, design, and domain names
DEDUCTIONS (VEHICLE)	<input type="checkbox"/> Postage & Shipping & PO Box (if applicable)
<input type="checkbox"/> Purchase/Sales Agreement For Purchase of Vehicles	<input type="checkbox"/> Books, newspapers, magazines for business purposes
<input type="checkbox"/> Insurance paid	<input type="checkbox"/> Meals and entertainment (these are usually only 50% deductible)
<input type="checkbox"/> Auto license plate fees and taxes	<input type="checkbox"/> Professional Fees - Lawyers, Accountants & Consultants
<input type="checkbox"/> Oil changes and other regular maintenance	<input type="checkbox"/> Equipment purchases - these usually are depreciated or expensed with a Sec 179 deduction
<input type="checkbox"/> Car washes	<input type="checkbox"/> Education and seminars - must be related to your current business, not for a new career
<input type="checkbox"/> Gasoline or other fuel	<input type="checkbox"/> Customer gifts
<input type="checkbox"/> Repairs - these may need to be depreciated	<input type="checkbox"/> Software purchases & Subscriptions
<input type="checkbox"/> Business-use vehicle lease expense	<input type="checkbox"/> Association and membership fees
<input type="checkbox"/> Mileage driven for business purposes	<input type="checkbox"/> Bank service charges
DEDUCTIONS (GENERAL)	TAXES
<input type="checkbox"/> Advertising - Billboards, Brochures/Flyers, Business Cards, Copy Editor Fees, Direct Mail, Email Marketing and Newsletters, Graphic Designer Fees, Internet Ads, Leads/Mailing Lists, Marketing Services, Networking Event Costs, Post Cards, Print Ads, Promotional Materials, Radio Ads, Signage/Banners, Television Ads	<input type="checkbox"/> Estimated Tax Payments Made