



# Tax Checklist

for Self-Employed,  
Freelancers and Sole Proprietors

## Income Documents

- 1099MISC from freelance clients or companies
- Income receipts for freelance work (not issued on a 1099)
- 1099MISC from advertising
- 1099MISC from affiliate income (Amazon, Google)
- Receipts for any other self-employed income
- Value of promotional gifts received (books or products sent for reviews)
- Receipts for estimated tax payments paid quarterly
- Other income statements from revenue made throughout the year

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## Expense Documents

- Website domain hosting and registration fees
- Promotional and giveaway costs (paid out of pocket)
- Conference tickets and passes
- Travel costs (hotel, airfare, rental car, parking, meals)
- Business cards, brochures and promotional items
- Shipping and packaging costs (PO Box fee)
- Bank charges (credit card interest, service fees)
- Marketing and advertising fees (email newsletter, Facebook promotions, Twitter ads)
- Computer software, electronics, apps (Acrobat, Scrivener, Scanner Pro)
- Monthly or yearly subscriptions (private forums, networking clubs, magazines)
- Continuing education costs (books, courses, certificates)
- Graphic designer fees, website theme or layout costs
- Employee, assistant and project fees (virtual assistants)
- Legal and professional fees (lawyer, bookkeeper, accountant)
- Office supplies, furniture and equipment (desks, computers, printers, paper, ink)
- Special clothing and supplies (required to conduct business)
- Internet, phone, fax charges (used for business purposes only)
- Health insurance premiums (Self-employed)

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