

Self-Employed Individuals

Get Your Tax Documents Organized

To Prepare your Individual Tax Return, documents are essential.

Bring or Upload the following:

Prior year tax return(s)

Bank account routing and account number for direct deposit of refund

SSNs and birthdates of you and everyone you claim in your household

Photo ID

1099-MISC (if any)

K-1 forms for Partnership, S Corp, or Estate/Trust income (if any)

Business records for self-employed individuals (such as spreadsheets, balance sheets)

- You will need records of your income (if not reported on a 1099-MISC).
- You will need records of business expenses such as: advertising expenses, office expenses, mileage (with odometer readings at beginning and end of the year), automobile information, phone, internet, equipment purchases, rentals, tools, software, supplies, sales, travel expenses (flights, meals, parking).
- Home Office information (sq ft of home, sq ft of Office)
- Records of health insurance.
- Records of any quarterly taxes (FED and STATE) paid during the year.

1095-A Health Insurance Statement (if you purchased insurance through an Exchange)

1095-B and/or **1095-C** from your employer regarding employer-sponsored health-plans

1099-SA from your HSA provider (if any)

W2 forms from your employer (if you had a day job)

1099-INT from your bank (if you had interest income from savings or checking)

1099-B and **1099-DIV** from your broker (if you had investment income)

1099-R Withdrawals from retirement accounts (if any)

1098 Mortgage Interest Statement from your Lender

1098-E Student Loan Interest Statement (if you paid interest on Student Loans)

Child care expenses and provider information (including name, address, and tax ID)

Charitable Donations Records / Receipts

IRA Contributions

Roth IRA Contributions

Health Savings Account (HSA) Contributions