

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 written records of your income (if not reported on a 1099-MISC)
- You will need written records of business expenses such as: advertising expenses, office expenses, web site expenses, business mileage, phone, internet, equipment purchases, repairs, rentals, tools, software, supplies, business education and development, business meals, etc
- Travel expenses (including flights, lodging, parking, location traveled to and number of nights spent at each location).
- Home Office information (sq ft of home, sq ft of office)
- Records of sales tax collected and paid (if you sell tangible items to customers)
- Records of any quarterly taxes (FED and STATE) paid during the year.

1095-A, 1095-B and/or 1095-C Health Insurance Statement

1099-SA from your Health Savings Account provider (if you have an HSA)

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

Closing HUD Statement (if you bought or sold a home or real estate)

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

Retirement Contributions (such as Roth IRA, Traditional IRA, SEP IRA, Solo 401K)

Health Savings Account (HSA) Contributions

Certificate of Rent Paid (CRP) from your landlord (if you are renting)

Get a Secure Upload Link by sending a request to 1040@atzel.com

Privacy Policy

Your privacy is important. Please read the following privacy policy.

I collect nonpublic personal information about you from various sources, including:

- Interviews regarding your tax situation
- Organizers, or other documents that supply such information as your name, address, telephone number, Social Security Number, number of dependents, income, and other tax-related data
- Tax-related documents you provide that are required for preparing tax returns, such as W2, 1099-MISC, 1098, 1099-R, 1099-INT and 1099-DIV, and stock transactions
- I do not disclose any nonpublic personal information about clients or former clients to anyone, except as required by law.
- I maintain physical, electronic, and procedural safeguards that comply with federal regulations to guard your personal information.

If you have any questions about our privacy policy, please contact me.

Sincerely,

Amy Atzel
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