

CHECKLIST / 01

Freelancer tax records

A printable checklist for freelancers and self-employed businesses. Check what is ready, mark items that do not apply, and flag questions for your tax professional.

Business / nickname

Tax year

Income & client activity

- ☐ Invoices and client payment history
- ☐ Cash receipts and other income records
- ☐ Platform and processor statements
- ☐ Payer statements and tax forms received
- ☐ Refunds, fees, and reimbursement records

Business spending

- ☐ Bank and card statements
- ☐ Receipts, invoices, and payment proof
- ☐ Software, supplies, and service records
- ☐ Advertising and professional fees
- ☐ Contractor and vendor payment records

Equipment & work use

- ☐ Equipment purchase documents
- ☐ Dates items were first used for business
- ☐ Business and personal-use records
- ☐ Relevant workspace records
- ☐ Travel or mileage records to review

Planning & follow-up

- ☐ Estimated-payment confirmations
- ☐ Relevant prior-year tax records
- ☐ Tax notices and correspondence
- ☐ Business or location changes to discuss
- ☐ Open questions for your tax professional

Missing item / next step

Official reference: IRS Self-Employed Individuals Tax Center

General U.S. federal tax education. Your facts and state rules may differ. Do not email Social Security numbers, tax returns, or account numbers through the website inquiry form.