file! with a tax pro

Checklist + tips *to help* with the Self-Employment Sections of your Tax Return with the IRS

IF you're working with a CPA, Accountant or Tax Preparer

This checklist covers the basics that are related to Self-Employment—Schedule C, SE, and a few lines on the 1040. The checklist does NOT include steps to complete the entire 1040 form. It's possible that you might have a few additional details to add, or issues to explore. Hopefully, getting the basics all done will make it easier to figure out the rest.
Questions? Email me at: jennygirlfriday@gmail.com.

♥ Lines in BLUE apply to some of you. Check the hearts when the task is complete.

♥ **Gather**

- ♥ CALCULATE-Basic Worksheet
- ♥ Questions
- ♥ 1099-MISCs - *if you have these*
- ♥ 1099-Ks - *if you have these*
- ♥ Car Info - if claiming mileage: make, model, beginning and ending odometer readings

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♥ **Tax Pro *In Person***

- ♥ 1 Take ~ everything you've gathered
- ♥ 2 Be ready with your List of questions. *(Ask about health insurance, if you purchased it yourself.)*
- ♥ 3 Optional: ask for feedback or tips for next year.

Note: if you're working with someone who's NOT an accounatant/CPA—such as a volunteer at the library, or a person at H&R Block—it's important to note that (usually) their main job is to help you complete the forms. They may not be able to give advice, or find additional deductions for you.

OR

♥ **Tax Pro *Via Portal or Mail***

Usually ~ You will be asked to:

- ♥ 1 Submit your documents—via a web portal or snail mail.
- ♥ 2 Fill out a questionaire, which will ask you about all the figures you've collected.

  Note: They might ask in a different order than how we prepared.
- ♥ 3 ProTip: Ask if you can upload your CALCULATE-Basic worksheet instead of going through their questionaire

Then ~

- ♥ 4 Ask any questions that you've collected. Don't be shy!
- ♥ 5 Optional: ask for feedback or tips for next year.

♥ **Celebrate!** ♥ Well done! It's time Treat Yo'self!