

file! online

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

For use with TurboTax, H&R Block, TaxAct, etc.

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 more 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.

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- ♥ **Gather**
- ♥ CALCULATE-Basic Worksheet
 - ♥ Questions
 - ♥ 1099-MISCs - *if you have these*
 - ♥ 1099-Ks - *if you have these*
 - ♥ Stuff to make it fun - ex: music, beverages, a friend
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- ♥ **Start**
- ♥ 1 Log in, navigate to the Federal Tax section
 - ♥ 2 Go to Income section - look for business / work for yourself / self-employment prompt
- Add Income**
- ♥ 3 Add 1099-MISCs related to business - *if you have these*
 - ♥ 4 Add 1099-Ks related to business - *if you have these*
 - ♥ 5 Add all other income
 - ♥ 6 Check - that income total matches your total
- Add Expenses**
- ♥ 7 Do NOT include mileage deduction in your Car + Truck figure - *it will ask about vehicles separately*
 - ♥ 8 Add expenses by category - *it will prompt you.*
Note: It may be in a different order than your CALCULATE-Basic Sheet. ProTip: check off each expense on your list after you enter into the program.
 - ♥ 9 For any categories remaining, find the Other Section, add each one: name and amount
 - ♥ 10 Home Office Expense - include square footage and home info, where prompted
 - ♥ 11 Vehicle Expense - provide car info and mileage where prompted
 - ♥ 12 Check totals, to see if they match your previous calculations
- Add EQ\$**
- ♥ 13 Add the estimated quarterly tax payments you sent in.
If the program doesn't guide you there, use Search to find the right page. This is CRUCIAL to get credit for these payments!
- Question**
- ♥ 14 Use the Support offered to answer questions—choose phone calls when possible
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- ♥ **Celebrate!**
- ♥ 15 Well done! It's time Treat Yo'self!