

Small Business Tax Document Checklist

For Schedule C, LLCs, and small business owners

Bring these to filing season so nothing slips through. Organized records mean a faster return and every deduction you are entitled to.

Income records

- Gross receipts and sales (all platforms and accounts)
- 1099-K and 1099-NEC received
- Returns and allowances
- Interest earned on a business account
- Other business income

Expense records

- Advertising and marketing
- Contract labor (and 1099-NECs you issued)
- Supplies and materials
- Rent or lease (office, equipment, vehicle)
- Utilities, phone, internet
- Insurance (business)
- Repairs and maintenance
- Software and subscriptions
- Professional fees (legal, accounting)
- Travel, meals (50%), and lodging
- Vehicle mileage or actual costs
- Employee wages and benefits (if any)

Assets & inventory

- Equipment purchases (for depreciation or Section 179)
- Beginning and ending inventory
- Cost of goods sold detail
- Home office square footage (if applicable)

Payments & prior filings

- Estimated tax payments made (federal and state)
- Prior-year business return
- EIN and entity formation documents
- Payroll reports (if you have employees)
- Sales tax filings (if applicable)

Tip: A simple monthly bookkeeping habit beats a shoebox in April. Ask us about year-round bookkeeping so filing is a non-event.

Ready to stop guessing? A real, IRS-registered preparer handles and reviews your return. Start in about 2 minutes at zerofusstaxes.com or call **689-331-5723**.

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