

Carrie Houchins-Witt, CFP®, EA
2023 Tax Preparation Checklist - Schedule C (Self-Employment)

Self-Employment Checklist (You can give me a spreadsheet, Quickbooks data, etc.)			
	Name, address, EIN of business		
	Type of business		
	All Income		
	If you provided 1099s, are they included in your total income listed?		
	Expenses (I do not need receipts, just totals in each category)		
	Advertising		
	Commissions / Fees		
	Contract Labor		
	Insurance (Other than health insurance for owner)		
	Interest paid		
	Legal & Professional fees		Do not include tax prep paid to Carrie
	Office Expenses (Postage, office supplies, publications)		
	Equipment Rental / Space Rental		
	Repairs & Maintenance		
	Supplies		
	Taxes & Licenses		Do not include self-employment tax
	Travel Expenses (Airfare, rental car, hotel)		
	Meals for business purposes		
	Utilities		Include business portion of cell phone
	Wages		
	Classes / Education / Training		
	Client Gifts (Limited to \$25 per client)		
	Other expenses		
	Depreciation		Depreciation schedule from 2022 returns
	Equipment		Items more than \$500 need description, cost, and date put into service
	Inventory		
	Inventory on hand 1/1/2023		
	Inventory purchased during 2023		
	Inventory used for personal use		
	Inventory on hand 12/31/2023		
	Auto Expenses		
	Make & Model of car		
	First day car went into service		
	Total mileage for the year		
	Total Business mileage		
	Total parking & tolls		
	Home Office (used exclusively and regularly for business)		
	Square footage of office		
	Square footage of home		
	Rent		
	Mortgage		
	Real estate taxes paid		
	Homeowners Insurance & Association Dues		
	Utilities		
	Repairs & Maintenance		
	First day home was used & value on that day		