

Independent Contractor Tax Records - Getting Started Checklist

Fill this in privately to organize your records before talking to a tax professional. No email or sign-up needed.

TAX YEARS TO REVIEW

- ☐ Tax years I may need to file or review: 20____ 20____ 20____ 20____
- ☐ Years I already filed: 20____ 20____ 20____ 20____

CUSTOMERS & INCOME SOURCES

- ☐ List each customer or platform that paid me (name + approximate total):
- ☐ 1. _____ 2. _____
- ☐ 3. _____ 4. _____

1099 FORMS

- ☐ 1099 forms I received (NEC / MISC / K) - one per customer or platform
- ☐ Customers who paid me \$600+ but did NOT send a 1099
- ☐ Payment apps I used (Venmo, PayPal, Zelle, Cash App, other): _____

INVOICES & PAYMENT RECORDS

- ☐ Invoices or receipts I issued, organized by year
- ☐ Bank statements showing customer deposits
- ☐ Payment-app histories exported or screenshotted
- ☐ Cash and check payments logged (date, customer, amount)

DUPLICATES TO RECONCILE

- ☐ Transfers between my own accounts (not income) - marked
- ☐ Payments appearing in both app history and bank deposit - counted once
- ☐ Refunds or reimbursements separated from income

Tip: count each payment once. A deposit that matches an app payment is the same income, not two.

EXPENSE RECORDS TO ORGANIZE

- ☐ Materials and supplies receipts
- ☐ Vehicle / mileage records
- ☐ Tools and equipment purchases
- ☐ Insurance, licenses, and permit fees
- ☐ Phone, software, and other business costs

MISSING DOCUMENTS

- ☐ Documents I could not find: _____
- ☐ Who might reissue them (employer, bank, platform): _____
- ☐ IRS transcripts may help fill gaps - but may not show all income or expenses

IRS NOTICES RECEIVED

- ☐ Letters or notices from the IRS (type + date): _____
- ☐ Deadlines shown on any notice: _____

QUESTIONS FOR MY ENROLLED AGENT

- ☐ 1. _____
- ☐ 2. _____
- ☐ 3. _____

Privacy safeguards:

- Do not write Social Security numbers or bank account numbers on this sheet.
- Nothing is collected, uploaded, or stored - this PDF is yours alone.
- Requirements depend on your circumstances; an Enrolled Agent can confirm what applies to you.