

TAX PREPARATION

CHECKLIST



COLLECT YOUR GENERAL INFORMATION

NAME, DATE OF BIRTH, ADDRESS, MARITAL STATUS, DEPENDENTS, ETC



COLLECT YOUR INCOME AND TAX FORMS

WAGES (W-2S), BUSINESS INCOME, RENTAL INCOME, ALIMONY, UNEMPLOYMENT, SOCIAL SECURITY, ETC



BUSINESS EXPENSES

PHONE, INTERNET, AUTO, EQUIPMENT, SUPPLIES, UTILITIES, POSTAGE, EDUCATION, LICENSING, ETC



BUSINESS DEDUCTIONS & CHARITY

INSURANCE, MEDICAL, DENTAL, CHURCH, RED CROSS, HOME OFFICE, ETC



FILING DATES

JAN 1 - MARCH 31	APRIL 15
APRIL 1 - MAY 31	JUNE 15
JUNE 1 - AUG 31	SEPT 15
SEPT 1 - DEC 31	JANUARY 15



HELPFUL RESOURCES

QUICKBOOKS SELF-EMPLOYED
TURBO TAX
IRS.GOV
EFTPS.COM