

TAX PREPARATION CHECKLIST

You don't need perfect books. You need a complete income picture, reasonable expense documentation, and organized records. This checklist is designed to help you get to that place.

Income Records

Gather statements and reports for any account that received business income, including:

- Bank statements
- Credit card or payment processor statements
- Platform payout reports
- Year-end earnings summaries

Tax Forms

Collect copies of:

- Prior year tax return
- 1099 forms
- W-2 (if applicable)
- 1099-K or processor tax forms

Tax forms do not always match deposits. Include both the tax forms and the related deposit statements.

Business Expense Details

- Software or platform fees
- Professional services
- Supplies, equipment, rental
- Marketing or advertising
- Travel, phone, workspace expenses

If you do not already track expenses, use a simple expense tracker with standardized categories to organize your records.

Download: [Expense Tracker Spreadsheet](#)

Situations Requiring Extra Organization

- Started business mid-year
- Multiple income streams or platforms
- Mixed personal + business funds
- Brand or stage name differs from legal name
- Income received but is not on a tax form

You May Need Cleanup First If:

- Missing months of records
- Income streams not tracked together
- Only net deposits recorded (fees not tracked separately)
- No expense categories
- Platform totals don't equal bank deposits
- You are estimating numbers

If 2+ apply → Cleanup can reduce tax risk and stress.