



## Schedule C/Self Employment Checklist

Fill out this form for each return that has self-employment income. This form is a guide to make sure the tax preparer (Sun Loan Employee) has collected all required documentation.

Taxpayer Name \_\_\_\_\_ SSN \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

**Required Documentation:** The following forms are needed for EVERY return with self-employment income. These forms are required for anyone with Schedule C income or a 1099 NEC with income in Box 1.

- Completed & Signed **Schedule C Interview Sheet**
- Completed & Signed **Schedule C Worksheet**
- Completed **Schedule C/Self Employment Checklist** (this form)

Proof of **ALL** income and expenses (categorized, organized, and totaled).

\*Income and expenses cannot be taxpayer created, must be verifiable through a third party (i.e. receipts)

- ALL** 1099 NEC forms (if they received any)
- Completed Supporting Documentation Cover Sheet

**Additional Documentation:** The following forms are common items the taxpayer may have. Please check the boxes below of all the forms that apply to this taxpayer.

- Mileage Log (if they are claiming mileage, they must have a mileage log that includes date of trip, reason for trip, starting odometer reading, & ending odometer reading)
- Completed Auto Expense Worksheet if claiming mileage or auto expenses
- If the taxpayer maintains inventory (food trucks, Mary Kay, etc.)  
Beginning inventory \$ \_\_\_\_\_ Ending inventory \$ \_\_\_\_\_
- Other forms (describe): \_\_\_\_\_

Preparer Name: \_\_\_\_\_

Sun Loan Store Phone Number: \_\_\_\_\_



# Schedule C Worksheet

Either the taxpayer or tax preparer fill out this form to determine income and expenses for all returns with self-employment income. Tax preparer (Sun Loan Employee) must verify all information, collect legible documentation, and keep records in the taxpayer's file.

Taxpayer Name \_\_\_\_\_ SSN \_\_\_\_\_ - \_\_\_\_\_

Type of Work/Business \_\_\_\_\_

**Income:**

Total income listed on all 1099 NEC forms in Box 1 (if any).....\$ \_\_\_\_\_

Total income not reported on 1099 NEC (gross sales, receipts, other).....\$ \_\_\_\_\_

**Expenses:** (Sun Loan employee must initial each box to confirm supporting documentation was received from the taxpayer.)

- Advertising.....\$ \_\_\_\_\_
- Contract Labor – total amount the taxpayer paid to any worker(s).\$ \_\_\_\_\_
- Business Insurance – workman’s comp, liability, etc.....\$ \_\_\_\_\_
- Office expenses – software, cell phones, etc .....\$ \_\_\_\_\_
- Supplies – paper, pens, printer ink, etc.....\$ \_\_\_\_\_
- Business taxes and Licenses.....\$ \_\_\_\_\_
- Business travel – lodging.....\$ \_\_\_\_\_
- Meals.....\$ \_\_\_\_\_
- Other Expenses: Describe below (use back of sheet if needed)  
 \_\_\_\_\_ \$ \_\_\_\_\_  
 \_\_\_\_\_ \$ \_\_\_\_\_

*\*If you have car and/or truck expenses, please complete the **Auto Expense Worksheet***

***I, the undersigned, hereby certify that all the information provided on this form is true and correct.***

Taxpayer Signature: \_\_\_\_\_ Date: \_\_\_\_\_

***I verify the taxpayer provided the above documents.***

Interviewer Signature: \_\_\_\_\_ Date: \_\_\_\_\_