

2017 Checklist for Self Employed Individuals of items to bring to your tax preparation appointment at Allied Accounting Services, Inc.

- 1099-K-Credit Card Transactions
- 1099-MISC for income received
- Monthly bank statements for business account
- Income log showing gross receipts or sales
- Financial reports, if available
- Physical inventory count at cost as of 12/31/2017
- 1099-MISC issued to subcontractors
- Payroll tax reports, 941's, 940, Unemployment
- Sales tax paid on Form 160 to State of MI
- Equipment or capital purchases receipts, including description, date and amount of purchase
- List of equipment disposals, including date and amount if sold
- Vehicle mileage log (**Dates and locations on a calendar or on an Excel spreadsheet**)
- Advertising expenses
- Business Insurance expense
- Health Insurance expense
- Interest paid on all business loans,
- Business Loan balances at 12/31/2017
- Legal and Professional Services expense
- Office supplies & postage
- Personal Property Tax Statement if applicable
- Rent or lease payments of building or equipment
- Repairs or maintenance expenses
- Supplies purchased
- License fees or professional association dues
- Travel, meals and entertainment expenses
- Utilities paid
- Continuing Education expenses
- Business cell phone expense
- Business internet expense
- Merchant Credit Card Statements if applicable
- Actual Auto Expenses including insurance, repairs, car wash, plates, interest, gas, and miles driven (**need log**)

Business Use of Home as an Office

- Calculations of office space used, total square footage of home and hours used if day care
- Rent paid or mortgage interest statement
- Property taxes paid
- Home Insurance
- Utilities paid
- Repairs and maintenance of home
- Capital improvements to home (date and description of improvements)
- Cost of home including improvements if 1st year used

We are asking that you please include your email address. We are looking to move to electronic mailings in the future. Please bring a copy of your driver license(s) to file your tax return.