

Freelancer Tax Preparation Checklist

Self-Employment & Freelancers | Checklist | Tax year 2025 | Updated October 15, 2026

Collect client income, business costs, and payment records before filing.

Who should use this resource?

Designed for freelancer readers who want to organize records and prepare informed questions.

What this resource covers

1. Match invoices and payment processor reports with deposits
2. Gather 1099 forms and other income records
3. Separate personal and business expenses
4. Review estimated tax payments and prior-year return

How to use it

Work through each item using your own records. Mark items complete as you gather documents or finish a review. Keep original source records securely and check current instructions before filing or paying taxes.

Review checklist

- ☐ Match invoices and payment processor reports with deposits
- ☐ Gather 1099 forms and other income records
- ☐ Separate personal and business expenses
- ☐ Review estimated tax payments and prior-year return

Common mistakes to avoid

Do not rely on an earlier year's rule, estimate figures without source documents, or treat this worksheet as an official tax form. Verify current instructions before filing or paying.

Official references

IRS Small Business and Self-Employed Tax Center: <https://www.irs.gov/businesses/small-businesses-self-employed>

IRS: Estimated taxes: <https://www.irs.gov/businesses/small-businesses-self-employed/estimated-taxes>

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