

TAX RECORD KEEPING

KEEPING THE RIGHT RECORDS

BUSINESS

INDIVIDUAL

INCOME

1099 & Schedule K-1
Bank and Brokerage Statements
Business Income Records
Business Property Sales

- W-2, 1099
- Bank & Brokerage Statements
- Hobby Income Records
- Home Property Sales

EXPENSE

Rent, Leases
Licenses, Insurance
Office expenses
Advertising
Wages

- Refinance Documents
- Home Improvement Receipts
- Insurance Records
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DEDUCTIONS & DONATIONS

Apps and Software
Contractors
Utilities
Website

- Medical Expenses
- Real Estate Tax
- Mortgage Interest
- Cash & Non-Cash Contributions

OTHER

Business Use of your Home
Tax Credits
Vehicle Mileage & Fuel Purchase Log

- Alimony
- Gambling
- Tax Credits
- Mutual Funds Statements
- IRA - 1099-R, 5498 & 8606



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