

## Stress-Free Freelancer Finances & Taxes

## Self-Employed Tax Checklist

### Know Your Legal Entity & Tax Filings



Sole Proprietor/ Form 1040 Schedule C & Schedule SE



Partnership/Form 1065 & Schedule K-1 (Pass-through)



S Corporation/ Form 1120S & Schedule K-1 (Pass-through)



C Corporation/ Form 1120 (Separate tax-paying entity)



imited Liability Company/ Filing based on federal tax entity

#### Know Your Tax Deductions



What is a Tax Deduction



Most Common Tax Deductions for the Self-Employed



Most Common Tax Deductions for your Industry Type



Additional Tax Deductions Not on Schedule C

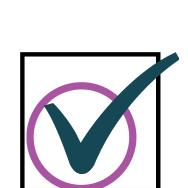


Tax Deductions that require more calculation & documentation

#### Know Your Tax Deadlines



Quarterly estimated tax payments (Form 1040-ES) 4/15, 6/15, 9/15, 1/15 (of the following year)



Individual Tax Return (Form 1040)
4/15 (if no extension has been timely filed)



Individual Tax Return Extension (Form 4868) 4/15 (will provide 6 more months to file)



Extended Individual Tax Return (Form 1040) 10/15 (if extension has been timely filed)



To claim a refund, you must file Form 1040X within 3 years after the date you filed your original return or within 2 years after the date you paid the tax, whichever is later.

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