

## Tax Preparation Checklist for Drivers, W-2 Workers, Gig Workers And Freelancers

Before filing your taxes, ensure you have the necessary documents and information ready. Use this checklist to streamline the process and maximize your deductions.

### 1. Personal Information

This helps the IRS identify you and process your return:

- ☐ Social Security Number (SSN) or Individual Taxpayer Identification Number (ITIN).
- ☐ Birthdates for yourself, spouse, and dependents (if applicable).
- ☐ Bank account and routing number for direct deposit of your refund or payment.
- ☐ A copy of last year's tax return (optional but helpful).

### 2. Income Information

Gather documents that report your income from various sources:

- ☐ **1099-NEC:** For freelance or contract work.
- ☐ **1099-K:** For payments processed through third-party platforms (e.g., Uber, DoorDash, PayPal).
- ☐ **W-2:** If you also work as an employee.
- ☐ **1099-G:** For unemployment benefits or state/local tax refunds.

Proof of cash earnings or tips.

- ☐ Records of rental income (if applicable).

### 3. Business Expenses and Deductions

Tracking your expenses helps lower your taxable income:

- ☐ Mileage logs for business-related driving.
- ☐ Receipts for gas, vehicle maintenance, insurance, and parking fees.
- ☐ Office supplies and software subscriptions.
- ☐ Cell phone and internet bills (business portion only).
- ☐ Costs of marketing, advertising, or website hosting.
- ☐ Records for meals and travel expenses related to work.
- ☐ Health insurance premiums (self-employed).

### 4. Tax Deductions and Credits

These deductions and credits can significantly reduce your tax bill:

- ☐ **Self-Employment Tax:** For Social Security and Medicare contributions.
- ☐ **Home Office Deduction:** If you use part of your home exclusively for work.
- ☐ **Education Credits:** Expenses for courses or certifications related to your gig.
- ☐ **Childcare Credits:** For working parents.
- ☐ **Energy Efficiency Credits:** For home improvements like solar panels.

### 5. Health Insurance and Retirement Contributions

If you're self-employed, these deductions can benefit you:

- ☐ **1095-A:** If you purchased health insurance through the Affordable Care Act marketplace.
- ☐ Records of contributions to an IRA, SEP IRA, or Solo 401(k).

## 6. Estimated Tax Payments

If you make quarterly payments, gather these details:

- ☐ Dates and amounts of estimated tax payments.
- ☐ Proof of payments made for prior years.

## 7. Additional Considerations

Depending on your situation, you might need:

- ☐ Details of alimony paid (for divorces finalized before 2019).
- ☐ Gambling winnings and losses (if applicable).
- ☐ Records of taxable legal settlements.
- ☐ Information about foreign bank accounts (if applicable).

### Pro Tip:

Keeping your records organized year-round can make tax time stress-free. Use digital tools or apps to track your income and expenses automatically.

For hassle-free filing and to ensure you're claiming every deduction available, consider working with a professional. **WBB Gig Taxes** specializes in tax preparation for gig workers, offering expert guidance tailored to your unique needs. File confidently with us today!