SELF-EMPLOYED TAX RETURNS / 01

BUILD THE SELF-EMPLOYMENT CONTEXT

Give each preparer the same high-level starting point. Keep tax documents, amounts and private identities out.

A helpful preparation resource from PickYourPro.ai. Fill in digitally or print. Keep your completed copy private.

Tax year or years and business or work activity categories - no taxpayer identification numbers

General operating period, work pattern and major business changes for preparer review

Business structure already documented and prior-return availability - no client classification decision

States, countries or work locations that may need professional review - no filing determination

Bookkeeping system, reconciliation status and record organization at a high level

Known timing concerns, private notices and open questions to discuss securely with the preparer

Preparation only. Not tax, accounting or legal advice; no filing, classification, form, treatment, deduction, credit, basis, depreciation, residency, nexus, deadline, retention, liability, payment, refund or outcome determination. Never enter sensitive data.

SELF-EMPLOYED TAX RETURNS / 02

MAP RECORD CATEGORIES AND READINESS

Organize categories, not tax positions. The preparer should review the actual private records securely.

Income-source and supporting-record categories - no amounts, payer identities or account data

Expense and purchase record categories - no deduction, allocation or tax-treatment conclusion

Asset, equipment and disposition record categories - no basis or depreciation decision

Worker, contractor, payroll or benefits record categories for preparer review - no classification decision

Inventory, vehicle, travel, workspace or home-use categories that may need secure professional review

Prior returns, bookkeeping reports, missing categories, cleanup needs and responsible owner

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SELF-EMPLOYED TAX RETURNS / 03

PREPARE SECURE REVIEW AND HANDOFF

Tick what is ready, then keep every private record inside the preparer's approved secure process.

- [ ] The workbook contains no tax forms, amounts, account data or identification numbers
- [ ] Business activity, tax years and operating context are stated at a high level
- [ ] Income and expense categories are listed without tax-treatment conclusions
- [ ] Assets, workers, vehicles, locations and home-use questions are flagged for professional review
- [ ] Bookkeeping status, prior returns and missing categories are identified
- [ ] A preparer-approved secure exchange method will be used
- [ ] Qualifications, engagement scope and client responsibilities will be confirmed
- [ ] Review, authorization, delivery, copies and later support are addressed

Category-level record inventory, missing-item owner and secure delivery status - no documents here

Preparer questions, client decisions, review, approval, authorization and completed-return delivery process

Later questions, copies, notices, amendments, billing, open items and follow-up ownership

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SELF-EMPLOYED TAX RETURNS / 04

QUESTIONS FOR A SELF-EMPLOYED TAX PREPARER

Record how each preparer would scope, secure, review and support the same non-sensitive business brief.

Experience: what qualifications and self-employed experience apply, and how can they be confirmed?

Scope: what return, bookkeeping-cleanup and later-support work is included or separately scoped?

Records: which business record categories will you review, and what should remain in the secure channel?

Workflow: how are missing items, questions, client decisions, preparation and review handled?

Authorization: how do client approval, filing authorization, delivery and completed-return copies work?

Follow-up: what later-question, notice, amendment, record-request or representation support is included?

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SELF-EMPLOYED TAX RETURNS / 05

COMPARE SELF-EMPLOYED RETURN PROPOSALS

Use A and B in every box after each preparer reviews the same non-sensitive record-readiness brief.

Preparer A / Preparer B / proposal dates and shared self-employment and tax-year brief

Qualifications, return scope, bookkeeping cleanup, inclusions, exclusions and client responsibilities - A / B

Secure exchange, record review, questions, decisions, approval, authorization and delivery - A / B

Complete proposal, timing, copies, later questions, notices, amendments, support and open items - A / B

READY TO HEAR FROM PROS?

Create an account on PickYourPro.ai only if you choose, then start a Tax Preparation request. Share a non-sensitive self-employment, tax-year, record-category, bookkeeping-readiness and secure-handoff brief so participating pros can compete with proposals. Compare qualifications, scope, secure exchange, review workflow, follow-up, timing and fit. Never post tax documents, amounts or sensitive personal, business or financial data.

One request. Every pro's best offer.

Start a request

Participation varies. A secure business-context, bookkeeping-readiness and record-category review may be needed before a final engagement proposal.

Planning guide: https://www.pickyourpro.ai/services/tax-preparation/self-employed-returns

Internal Revenue Service: Recordkeeping (official reference)

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