

Your Year End Readiness Score

This assessment measures how prepared your current records and year-end process are. It does not measure tax-return accuracy, and it does not assume that final documents are already available in November.

SCORING: YES = 2 points PARTLY = 1 point NO = 0 points

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|-----|--|------------------------------|---------------------------------|-----------------------------|
| 1. | I have identified every platform and channel where I received business income this year. | ☐ YES | ☐ PARTLY | ☐ NO |
| 2. | I can access year-to-date activity reports from each selling platform. | ☐ YES | ☐ PARTLY | ☐ NO |
| 3. | I have recorded sales received outside my selling platforms. | ☐ YES | ☐ PARTLY | ☐ NO |
| 4. | I have business bank and credit-card statements through the latest completed month. | ☐ YES | ☐ PARTLY | ☐ NO |
| 5. | My business expenses are recorded through the latest completed month. | ☐ YES | ☐ PARTLY | ☐ NO |
| 6. | I have records supporting inventory purchased this year. | ☐ YES | ☐ PARTLY | ☐ NO |
| 7. | I know the beginning inventory amount carried into this year. | ☐ YES | ☐ PARTLY | ☐ NO |
| 8. | I have a plan for determining ending inventory after December 31. | ☐ YES | ☐ PARTLY | ☐ NO |
| 9. | My mileage tracking is reasonably current. | ☐ YES | ☐ PARTLY | ☐ NO |
| 10. | I have identified equipment and other major purchases made this year. | ☐ YES | ☐ PARTLY | ☐ NO |
| 11. | I have a process for tracking all remaining November and December activity. | ☐ YES | ☐ PARTLY | ☐ NO |
| 12. | I know which final documents I must retrieve after year end. | ☐ YES | ☐ PARTLY | ☐ NO |

MY STARTING SCORE _____

- | | |
|--------------|--------------------------------|
| 20-24 | Strong Year-End Position |
| 14-19 | Making Progress |
| 7-13 | Several Gaps to Address |
| 0-6 | Year-End Records Rescue Needed |

My weakest area: _____

The first record I need to update or locate: _____

Your Year End Evidence Plan

Use this page to separate the work you can do now from the activity you must keep tracking and the final documents that will only be available after the year closes.

1 GATHER OR UPDATE NOW

- | | |
|---|--|
| ☐ Prior-year Schedule C and ending inventory | ☐ Current year-to-date platform reports |
| ☐ Bank and credit-card statements | ☐ Expense and mileage records |
| ☐ Inventory purchase records | ☐ Equipment purchase information |
| ☐ Other-platform, cash and direct sales | |

2 CONTINUE TRACKING THROUGH DECEMBER 31

- | | |
|---|---|
| ☐ Sales, tips, refunds and cancellations | ☐ Platform fees and adjustments |
| ☐ Inventory purchases and operating expenses | ☐ Mileage and equipment purchases |
| ☐ Cash and direct sales | ☐ Inventory removed, damaged, donated or discarded |

3 COMPLETE AFTER YEAR END

- | | |
|---|---|
| ☐ Download final annual platform reports | ☐ Retrieve Forms 1099-K when issued |
| ☐ Collect final December statements | ☐ Determine ending inventory |
| ☐ Finalize annual mileage and expense totals | ☐ Complete the 1099-K reconciliation |
| ☐ Build the final Schedule C Map | |

MY THREE COMMITMENTS

One record I will update now:

One process I will maintain through December 31:

One task I will complete after year end:

WEEK 1 ASSIGNMENT

- | | |
|---|---|
| ☐ List every place where you received business income. | ☐ Download current year-to-date platform reports. |
| ☐ Review whether expenses and mileage are current. | ☐ Locate the prior-year Schedule C and ending inventory. |
| ☐ Create a list titled Documents to Retrieve After Year End. | |

PRIVACY REMINDER

Do not post Social Security numbers, account numbers, customer information or private financial details in a public chat. Use copies when redacting original records.

For general educational purposes. This handout does not provide individual tax advice or prepare a tax return.