

Independent Contractor Recordkeeping Guide

Self-Employment & Freelancers | Guide | Updated October 15, 2026

A practical filing plan for invoices, receipts, and client documents.

Who should use this resource?

Designed for freelancer readers who want to organize records and prepare informed questions.

What this resource covers

1. Separate client and business expense records
2. Save invoices and payment confirmations
3. Reconcile records to statements each month
4. Retain tax returns and supporting documents securely

How to use it

Work through each item using your own records. Mark items complete as you gather documents or finish a review. Keep original source records securely and check current instructions before filing or paying taxes.

Review checklist

- ☐ Separate client and business expense records
- ☐ Save invoices and payment confirmations
- ☐ Reconcile records to statements each month
- ☐ Retain tax returns and supporting documents securely

Official references

IRS: What kind of records should I keep?: <https://www.irs.gov/businesses/small-businesses-self-employed/what-kind-of-records-should-i-keep>

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