

## 2026 Tax Season Preparation Checklist

### **Personal Tax Documents**

- Social Security numbers for you, your spouse, and dependents
- Identify Protection PIN, if one has been issued to you, your spouse, or your dependent by the IRS.
- Copy of prior-year tax return (2024)
- 2025 Forms W-2 (employment income)
- 2025 Forms 1099 (e.g., NEC, MISC, INT, DIV, etc.)
- Investment income statements (e.g., brokerage, crypto, capital gains/losses, etc.)
- Estimated tax payments made for 2025
- Foreign-earned income records (e.g., employment, rental, investment income, etc.)

### **Business Owner / Self-Employed**

- Business' Profit & Loss statement for 2025
- Business' Balance Sheet statement (if applicable)
- Business bank and credit card statements
- 1099s issued to contractors (copies + confirmation of filing)
- Mileage logs or vehicle expense records
- Home office expense documentation
- Equipment or asset purchase records

### **Deductions & Credits**

- Retirement contributions (e.g., IRA, SEP, Solo 401(k), etc.)
- Health insurance premiums
- HSA/FSA contribution records
- Charitable donation receipts
- Education expenses (Forms 1098-T, student loan interest)
- Childcare expenses and provider information

### **Final Review**

- Confirm personal and business contact information
- Review changes in income or life events (e.g., marriage, change of address, new business, etc.)