

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.)