2026 Tax Preparation Checklist

PAGE 1 | INDIVIDUALS & FAMILIES | For 2026 income tax returns filed in 2027

IDENTIFICATION & FILING INFORMATION

- [ ] Government-issued photo ID for taxpayer and spouse (if applicable).
- [ ] Social Security numbers or ITINs for everyone included on the return; supporting cards or notices as requested.
- [ ] Prior-year federal/state tax returns (especially if you are a new client).
- [ ] Current address, contact information, marital status and any changes during 2026.

INCOME DOCUMENTS

- [ ] Forms W-2 from all employers.
- [ ] Forms 1099-NEC, 1099-K, 1099-MISC and other self-employment or gig-work income records.
- [ ] Forms 1099-INT, 1099-DIV, 1099-B, 1099-R, SSA-1099 and other income statements, as applicable.
- [ ] Unemployment, retirement, rental, investment, digital asset or other taxable income records.
- [ ] Forms 1095-A for Marketplace health insurance, if applicable.

DEPENDENTS & QUALIFYING CREDITS

- [ ] Names, birth dates and taxpayer identification numbers of dependents.
- [ ] Dependent relationship, household residency and support information.
- [ ] School, medical, childcare or other records supporting dependent eligibility if requested.
- [ ] Childcare provider name, address, taxpayer ID and amount paid (if claiming the credit).
- [ ] Education forms 1098-T, eligible tuition costs and scholarship information, if applicable.

DEDUCTIONS, PAYMENTS & OTHER RECORDS

- [ ] Mortgage interest (1098), property taxes, charitable contributions and eligible medical expenses, if itemizing.
- [ ] Student loan interest (1098-E), educator expenses, retirement/HSA contributions, if applicable.
- [ ] IRS or state tax notices, estimated tax payments and prior-year refund or balance-due information.
- [ ] Bank routing and account numbers for direct deposit or direct debit (verify carefully).

Not every item applies to every taxpayer. Additional documents may be required to substantiate credits or deductions.

Self-Employed & Small Business

PAGE 2 | BUSINESS INCOME & EXPENSE RECORDS | Complete in addition to Page 1, as applicable

BUSINESS DETAILS & INCOME

- [ ] Business legal name, DBA, EIN (if any), type of business and date operations began.
- [ ] Gross receipts and sales records, including cash, card, payment apps and online platforms.
- [ ] Forms 1099-NEC, 1099-K, 1099-MISC and related payment processor statements.
- [ ] Refunds, returns, allowances and other income adjustments.

BUSINESS EXPENSE RECORDS

- [ ] Advertising, marketing, website, subscriptions and professional software.
- [ ] Office supplies, equipment, postage, phone and internet business-use amounts.
- [ ] Rent, utilities, insurance, professional fees, contract labor and payroll records, as applicable.
- [ ] Travel, business meals, gifts and entertainment records (deduction limits and rules vary).
- [ ] Inventory, cost of goods sold and beginning/ending inventory, if applicable.

VEHICLE, HOME OFFICE & ASSETS

- [ ] Business mileage log with dates, destinations, business purposes and miles; total annual mileage.
- [ ] Vehicle expenses and purchase/lease records if using or evaluating actual-expense method.
- [ ] Home office square footage, total home area and eligible costs, if applicable.
- [ ] Purchase dates, costs and business-use percentages for equipment and other assets.

TAX PAYMENTS & OTHER CONSIDERATIONS

- [ ] Quarterly estimated tax payments and dates paid.
- [ ] Business bank/credit card statements and bookkeeping reports or profit-and-loss statement.
- [ ] Records of business loans, owner contributions/draws and any prior depreciation schedules.
- [ ] Information on employees, contractors, sales tax and other business filings, as applicable.

NEXT STEP	Book your tax appointment, then complete your intake and securely upload documents through the Flowers MaxTax TaxesToGo mobile app.

Secure app: https://taxestogo.com/App/Download/72494 | Never email Social Security numbers or tax documents through an ordinary contact form.