2026 Tax Document Checklist

Use this list to collect your documents as they arrive in January and February. Keep everything in one folder. Check off what applies to you and skip what doesn't.

About you and your family

- [ ] Photo ID for you and your spouse
- [ ] Social Security number or ITIN for everyone on the return
- [ ] Birth dates for you, your spouse and dependents
- [ ] Your current address
- [ ] Last year's federal and state tax returns
- [ ] Bank routing and account numbers for a direct deposit refund
- [ ] Your IP PIN, if the IRS gave you one
- [ ] Any letters from the IRS or California FTB

Income FORMS USUALLY ARRIVE BY EARLY FEBRUARY

- [ ] W-2 from every employer you worked for in 2026
- [ ] 1099-INT and 1099-DIV (bank interest and dividends)
- [ ] 1099-B or brokerage statement (investments you sold)
- [ ] 1099-R (pension, IRA or retirement payouts)
- [ ] SSA-1099 (Social Security benefits)
- [ ] 1099-G (unemployment or state tax refund)
- [ ] 1099-NEC, 1099-MISC or 1099-K (side work, apps and online sales)
- [ ] W-2G (gambling winnings)
- [ ] Records of any crypto or other digital asset sales
- [ ] 1095-A, if you had Covered California or Marketplace insurance

Deductions and credits

- [ ] Childcare costs, plus the provider's name, address and tax ID
- [ ] 1098 (mortgage interest) and property tax bills
- [ ] Receipts for charitable donations
- [ ] 1098-T (college tuition) and education expenses
- [ ] 1098-E (student loan interest)
- [ ] Retirement contributions (IRA, 401(k))
- [ ] HSA or FSA statements (5498-SA, 1099-SA)
- [ ] Large medical bills, if you may itemize

Married filing jointly? Bring documents for both spouses. **Missing a form?** Don't wait. Call us and we'll tell you what to do next.

Self-employed and small business

If you have a side job, drive for an app, or own a business, bring these in addition to page 1.

Income records

- [ ] 1099-NEC, 1099-MISC and 1099-K forms
- [ ] Bank, card processor and payment app statements
- [ ] Checks or cash paid to you that didn't come with a form
- [ ] Your total sales or income by month, if you track it

Expense records

- [ ] Receipts or a list of business expenses
- [ ] Mileage log for business driving
- [ ] Home office: square footage and household bills
- [ ] Equipment, phones or vehicles bought for the business
- [ ] Business insurance, rent and utilities
- [ ] Bookkeeping reports (profit and loss), if you have them

Payroll and payments

- [ ] Estimated tax payments you made (federal and California), with dates
- [ ] W-2s and payroll reports, if you have employees
- [ ] 1099s you sent to contractors
- [ ] Business entity papers and EIN, if new this year

Need an ITIN? FORM W-7

- [ ] A valid passport, or other original identity documents, for each person applying. Dependents may also need proof of U.S. residency.

We are a Certifying Acceptance Agent. In most cases we check your original documents at your appointment, so you don't have to mail your passport to the IRS.

> **Please don't email or message tax documents or Social Security numbers.** We will send you a secure upload link.

Book your free 30-minute consultation

By phone, Zoom or Microsoft Teams. You get a fixed price in writing before we start.

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