Year-end document checklist

TAX YEAR 2026

Gather these before you meet your CPA or open tax software

INCOME

- [ ] 1099-NEC forms from clients
- [ ] 1099-K forms from payment platforms / marketplaces
- [ ] 1099-MISC (rents, royalties, prizes)
- [ ] 1099-INT / 1099-DIV (bank interest, dividends)
- [ ] W-2 if you also had a job
- [ ] Income log reconciled to bank deposits
- [ ]
- [ ]

HEALTH & RETIREMENT

- [ ] Health insurance premium statements (self-employed)
- [ ] Form 1095-A / 1095-B / 1095-C
- [ ] HSA statements (Form 5498-SA / 1099-SA)
- [ ] SEP-IRA / Solo 401(k) / IRA contribution records
- [ ] Form 5498 (IRA contributions)
- [ ]
- [ ]

EXPENSES

- [ ] Receipts for every logged expense
- [ ] Bank & credit card statements (all 12 months)
- [ ] Mileage log with dates, purpose and miles
- [ ] Home office square footage measured
- [ ] Large purchases (equipment) with dates and cost
- [ ]
- [ ]

TAXES & ADMIN

- [ ] Estimated tax payment dates and confirmations
- [ ] Last year's tax return
- [ ] State estimated payments
- [ ] Bank details for refund / payment
- [ ] List of questions for your CPA
- [ ]
- [ ]

KEY TOTALS TO BRING

Gross receipts $ _____ Total expenses $ _____ Business miles _____

Home office sq ft _____ Estimated payments made $ _____ Retirement contributions $ _____

Full organizer (Excel/Sheets with automatic Schedule C totals + 16-page PDF): quietstack-labs.github.io/tax-organizer-2026

IMPORTANT: ORGANIZER ONLY - NOT TAX ADVICE

This organizer helps you collect and total your records. It does not calculate your tax.
Rates, limits and form lines change - verify on IRS.gov and consult a CPA or enrolled agent.