



The 2026 Tax Season Checklist: What to Bring

Gathering your documents early is the best way to avoid "April stress" and ensure you aren't giving the IRS an "interest-free loan." Dave Ramsey.

Please upload the following to your **Secure Client Portal** or bring them to your consultation:

1. The Essentials (New Clients Only)

- Previous Returns:** Copies of your last two years of Federal and State tax returns.
- ID Verification:** Clear photos/scans of Driver's Licenses for you and your spouse.
- Dependents:** Full names, birth dates, and Social Security cards for all children (required for the **2026 Expanded Child Tax Credit**).
- 2. Income Statements (The Paper Trail)**
- W-2s:** From all employers held during the year.
- 1099-NEC/MISC:** For any freelance work or "side hustles."
- 1099-INT/DIV/B:** Interest, dividends, and stock sale summaries from your brokerage accounts.
- 1099-K:** From payment apps like Venmo, PayPal, or Etsy if you sold goods or services.
- 1099-R:** Distributions from IRAs, 401(k)s, or pensions.
- K-1s:** If you have ownership in a Partnership, S-Corp, or Trust.

3. Family & Personal Deductions

- Childcare Costs:** Total paid to providers, including their **Tax ID (EIN)** or SSN.
- Form 1098:** Mortgage interest statement and property tax records.
- 1098-T/E:** Tuition statements or student loan interest paid.
- Charitable Giving:** Receipts for cash donations and a list of donated goods (with estimated value).
- HSA/FSA:** Summary of contributions and distributions for medical expenses.

4. 2026 "Special Interest" Items

- Digital Assets:** Records of any crypto or NFT sales, even if they were for a loss.
 - "Accuracy is the soul of tax planning."**
 - Energy Credits:** Receipts for solar panels, EV purchases, or energy-efficient home upgrades.
 - Rental Property:** A summary of income and a list of all expenses (repairs, insurance, utilities).
-