



2026 Tax Season Survival Guide

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YVL Accounting & Tax PLLC

Hey, I'm Yandra!

I'm here to help you have a stress-free tax season, and it all starts with being organized!

In this guide, you'll find a customizable personal tax organizer you can use to check off documents as you receive them, jot down notes for your accountant, and ignore anything that doesn't apply to you!

Whether your tax situation is relatively simple or it includes lots of investments, different credits, rental income, or other streams of income, this organizer walks you through what to prepare so you're not left wondering, "Am I missing something?" on April 15th!

Disclaimer: This guide is for educational purposes only and does not constitute tax, legal, or financial advice. Consult your qualified tax accountant.

Personal Information

- Your Full Legal Name _____
- Your SSN or ITIN / DOB _____ / _____
- Your Spouse's Full Legal Name _____
- Spouse SSN or ITIN / DOB _____ / _____
- Your Occupation / Spouse's Occupation _____ / _____
- Dependent SSN or ITIN / DOB _____ / _____
- Dependent SSN or ITIN / DOB _____ / _____
- Dependent SSN or ITIN / DOB _____ / _____
- Identity Protection PIN(s) _____
- Mailing Address _____
- Filing Status (circle one): Single / MFJ / MFS / HOH / QSS

Key Tax Questions

At any time during 2025, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, or otherwise dispose of a digital asset (or a financial interest in a digital asset)?

Yes No

Did you have any foreign bank accounts, financial assets, or receive income from foreign sources at any point in 2025?

Did you experience any of the following in 2025? Check all that apply.

- Marriage or divorce
- Birth or adoption of a child
- Death of a spouse or dependent
- Change in home address
- Started or closed a business

Income Documents

Form W-2	Received	N/A	Amount
Company _____	<input type="checkbox"/>	<input type="checkbox"/>	_____
Company _____	<input type="checkbox"/>	<input type="checkbox"/>	_____

Schedule C - Business	P&L Ready	N/A
Legal Name / EIN _____	<input type="checkbox"/>	<input type="checkbox"/>
Legal Name / EIN _____	<input type="checkbox"/>	<input type="checkbox"/>
Legal Name / EIN _____	<input type="checkbox"/>	<input type="checkbox"/>

Form 1099-NEC / MISC / K	Received	N/A	Amount
Payor _____	<input type="checkbox"/>	<input type="checkbox"/>	_____
Payor _____	<input type="checkbox"/>	<input type="checkbox"/>	_____
Payor _____	<input type="checkbox"/>	<input type="checkbox"/>	_____

Form 1099-INT	Received	N/A	Amount
Payor _____	<input type="checkbox"/>	<input type="checkbox"/>	_____
Payor _____	<input type="checkbox"/>	<input type="checkbox"/>	_____

Form 1099-DIV	Received	N/A	Amount
Payor _____	<input type="checkbox"/>	<input type="checkbox"/>	_____
Payor _____	<input type="checkbox"/>	<input type="checkbox"/>	_____

Form 1099-B	Received	N/A
Payor _____	<input type="checkbox"/>	<input type="checkbox"/>
Payor _____	<input type="checkbox"/>	<input type="checkbox"/>

Rental Income	P&L Ready	N/A
Address _____	<input type="checkbox"/>	<input type="checkbox"/>
Address _____	<input type="checkbox"/>	<input type="checkbox"/>

Income Documents (cont.)

Schedule K-1s	Received	N/A
Company _____	<input type="checkbox"/>	<input type="checkbox"/>
Company _____	<input type="checkbox"/>	<input type="checkbox"/>
Company _____	<input type="checkbox"/>	<input type="checkbox"/>

Form 1099-R	Received	N/A	Amount
Payor _____	<input type="checkbox"/>	<input type="checkbox"/>	_____
Payor _____	<input type="checkbox"/>	<input type="checkbox"/>	_____

Form SSA-1099	Received	N/A	Amount
Payor _____	<input type="checkbox"/>	<input type="checkbox"/>	_____
Payor _____	<input type="checkbox"/>	<input type="checkbox"/>	_____

Form 1099-G	Received	N/A	Amount
Payor _____	<input type="checkbox"/>	<input type="checkbox"/>	_____
Payor _____	<input type="checkbox"/>	<input type="checkbox"/>	_____

Closing Statement - Sale of Home	Received	N/A
Address _____	<input type="checkbox"/>	<input type="checkbox"/>

Alimony Received (for divorce agreements executed before 2019)	N/A
Amount / Notes _____	<input type="checkbox"/>

Form W2-G	Received	N/A	Amount
Payor _____	<input type="checkbox"/>	<input type="checkbox"/>	_____

Other Income	N/A
Notes _____	<input type="checkbox"/>
Notes _____	<input type="checkbox"/>
Notes _____	<input type="checkbox"/>

Adjustments to Income

HSA Contributions (excluding contributions shown on W-2) N/A

Taxpayer Amount _____

Spouse Amount _____

Educator Expenses N/A

Amount _____

Form 1098-E - Student Loan Interest Statement Received N/A Amount

Payor _____ _____

Self-Employed Health Insurance Premiums N/A

Amount _____

Traditional IRA Contributions N/A

Taxpayer Amount _____

Spouse Amount _____

Alimony Paid (for divorce agreements executed before 2019) N/A

Amount _____

Yes No

Did you or your spouse receive tip income in 2025?

Did you or your spouse receive overtime pay in 2025?

Did you or your spouse purchase a new passenger vehicle
(assembled in the US) in 2025 and take out a loan to finance it?

Itemized Deductions

Qualifying Medical Expenses				N/A
Amount	_____			<input type="checkbox"/>
State and Local Taxes				N/A
State / Property / Local	_____/_____/_____			<input type="checkbox"/>
Form 1098 - Mortgage Interest Paid		Received	N/A	Amount
Payor	_____	<input type="checkbox"/>	<input type="checkbox"/>	_____
Charitable Contributions				N/A
Cash / Check Amount	_____			<input type="checkbox"/>
Non-Cash Amount	_____			
Investment Interest Expense Paid				N/A
Amount	_____			<input type="checkbox"/>

Tax Credits

Child and Dependent Care Expenses				N/A
Provider Name / Address	_____/_____			<input type="checkbox"/>
Provider Tax ID / Amount Paid	_____/_____			<input type="checkbox"/>
Form 1098-T - Tuition Statement		Received	N/A	Amount
Payor	_____	<input type="checkbox"/>	<input type="checkbox"/>	_____
Energy Efficient Home Improvements		Documented?		N/A
Notes	_____	<input type="checkbox"/>		<input type="checkbox"/>
			Yes	No
Did you or your spouse purchase a new or used clean/electric vehicle in 2025?			<input type="checkbox"/>	<input type="checkbox"/>

Miscellaneous

Federal Estimated Taxes Paid N/A

Q1 / Q2 / Q3 / Q4 _____ / _____ / _____ / _____

State Estimated Taxes Paid N/A

Q1 / Q2 / Q3 / Q4 _____ / _____ / _____ / _____

Q1 / Q2 / Q3 / Q4 _____ / _____ / _____ / _____

Business Use of Home Documented N/A

Notes _____

Business Mileage Log Documented N/A

Notes _____

IRS / State Notices Received N/A

Notes _____

Retirement Account Contributions Documented N/A

Notes _____

Form 1095-A, -B, or -C Received N/A

Notes _____

Household Employee Information Documented N/A

Notes _____

Bank Account + Routing Number (if direct depositing)

Account # / Routing # _____

This organizer isn't an exhaustive list of every document every taxpayer will need to file their 2025 tax return; be sure to review your specific needs with your tax accountant

Tax Return Due Dates

Form 1040 - Individual Tax Return

April 15th, 2026: File tax return or extension, pay all taxes due.

October 15th, 2026: File extended tax return.

Form 1065 - Partnership Tax Return

March 15th, 2026: File tax return or extension, pay all taxes due.

September 15th, 2026: File extended tax return.

Form 1120 - Corporate Tax Return

April 15th, 2026: File tax return or extension, pay all taxes due.

October 15th, 2026: File extended tax return.

Form 1120-S - S Corporation Tax Return

March 15th, 2026: File tax return or extension, pay all taxes due.

September 15th, 2026: File extended tax return.

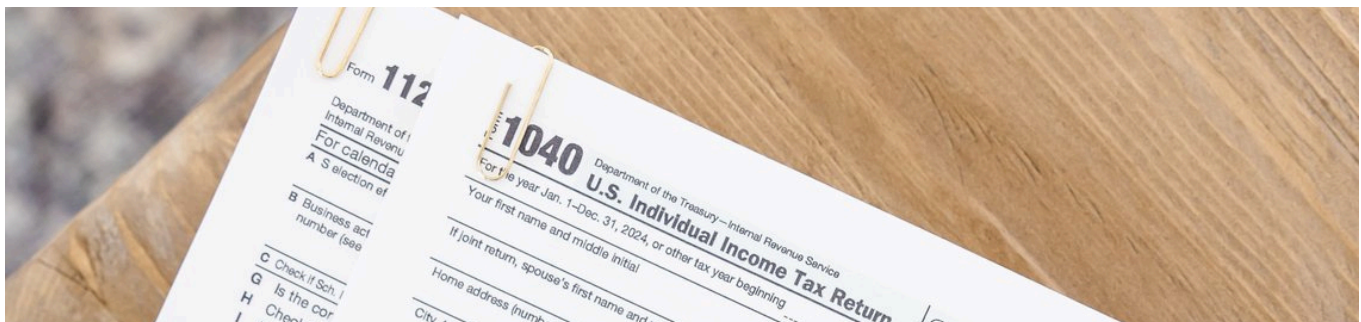
Individual Estimated Taxes

January 15th, 2026: Q4 2025 estimated tax payment due.

April 15th, 2026: Q1 2026 estimated tax payment due.

June 15th, 2026: Q2 2026 estimated tax payment due.

September 15th, 2026: Q3 2026 estimated tax payment due.





Let's Connect!

I'm passionate about helping small business owners understand their numbers through monthly bookkeeping, increase profits and streamline business processes, lower their tax liabilities and create a tax plan to keep more money in their pocket.

Book you Tax Consult

www.yvlaccountingandtax.com