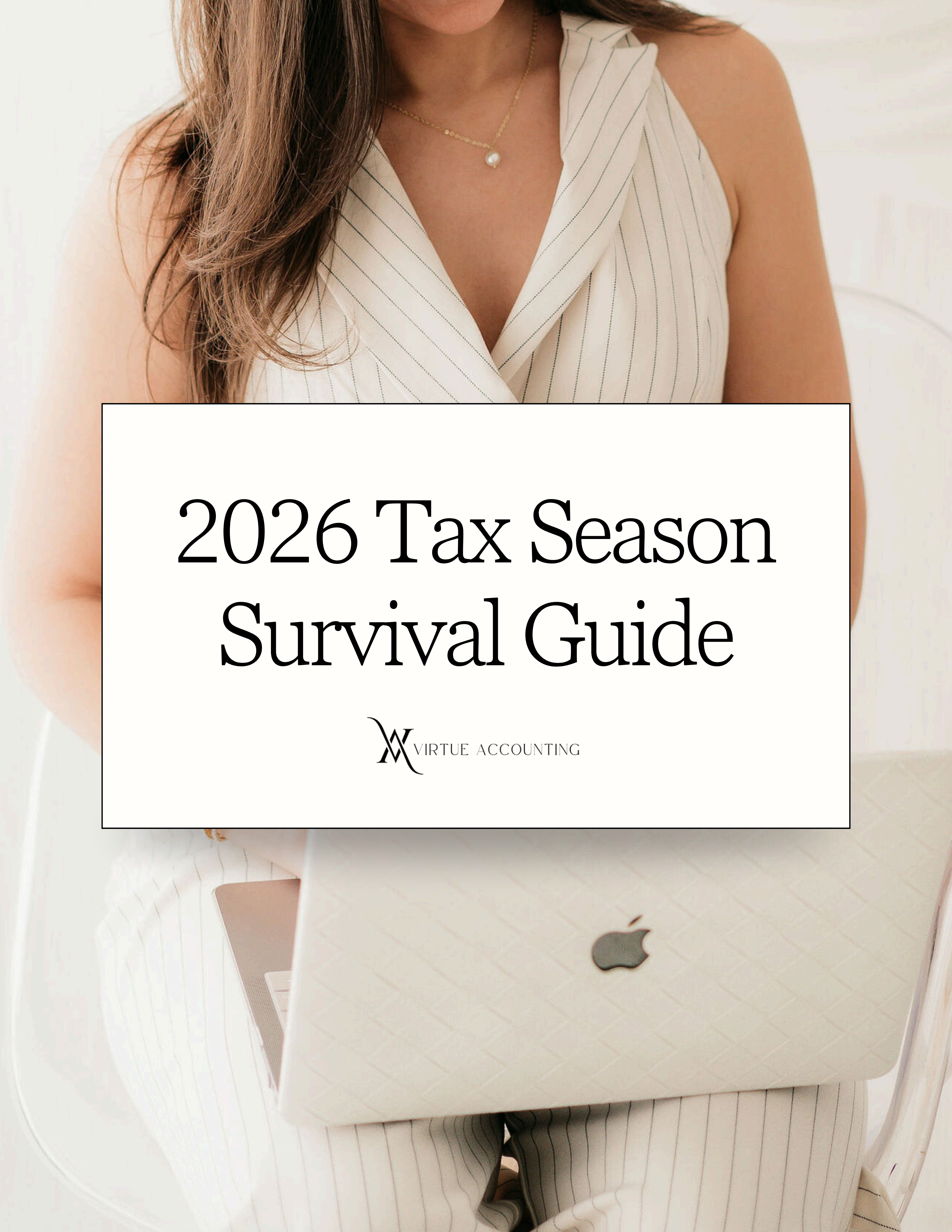


2026 Tax Season Survival Guide

VIRTUE ACCOUNTING

VIRTUE ACCOUNTING

Hey, I’m Samantha!

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

	Yes	No
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)?	☐	☐
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 ____________________	☐	☐	__________
Company ____________________	☐	☐	__________

Schedule C - Business	P&L Ready	N/A
Legal Name / EIN ____________________	☐	☐
Legal Name / EIN ____________________	☐	☐
Legal Name / EIN ____________________	☐	☐

Form 1099-NEC / MISC / K	Received	N/A	Amount
Payor ____________________	☐	☐	__________
Payor ____________________	☐	☐	__________
Payor ____________________	☐	☐	__________

Form 1099-INT	Received	N/A	Amount
Payor ____________________	☐	☐	__________
Payor ____________________	☐	☐	__________

Form 1099-DIV	Received	N/A	Amount
Payor ____________________	☐	☐	__________
Payor ____________________	☐	☐	__________

Form 1099-B	Received	N/A
Payor ____________________	☐	☐
Payor ____________________	☐	☐

Rental Income	P&L Ready	N/A
Address ____________________	☐	☐
Address ____________________	☐	☐

Income Documents (cont.)

Schedule K-1s — Received | N/A

Company ______________________ ☐ ☐

Company ______________________ ☐ ☐

Company ______________________ ☐ ☐

Form 1099-R — Received | N/A | Amount

Payor ______________________ ☐ ☐ ________

Payor ______________________ ☐ ☐ ________

Form SSA-1099 — Received | N/A | Amount

Payor ______________________ ☐ ☐ ________

Payor ______________________ ☐ ☐ ________

Form 1099-G — Received | N/A | Amount

Payor ______________________ ☐ ☐ ________

Payor ______________________ ☐ ☐ ________

Closing Statement - Sale of Home — Received | N/A

Address ______________________ ☐ ☐

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

Amount / Notes ______________________ ☐

Form W2-G — Received | N/A | Amount

Payor ______________________ ☐ ☐ ________

Other Income — N/A

Notes ______________________ ☐

Notes ______________________ ☐

Notes ______________________ ☐

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 ______________________________ ☐

State and Local Taxes N/A

State / Property / Local __________/__________/__________ ☐

Form 1098 - Mortgage Interest Paid Received N/A Amount

Payor ______________________________ ☐ ☐ __________

Charitable Contributions N/A

Cash / Check Amount ______________________________ ☐

Non-Cash Amount ______________________________

Investment Interest Expense Paid N/A

Amount ______________________________ ☐

Tax Credits

Child and Dependent Care Expenses N/A

Provider Name / Address __________/____________________ ☐

Provider Tax ID / Amount Paid ____________________/__________ ☐

Form 1098-T - Tuition Statement Received N/A Amount

Payor ______________________________ ☐ ☐ __________

Energy Efficient Home Improvements Documented? N/A

Notes ______________________________ ☐ ☐

Did you or your spouse purchase a new or used clean/electric vehicle in 2025? Yes ☐ No ☐

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.

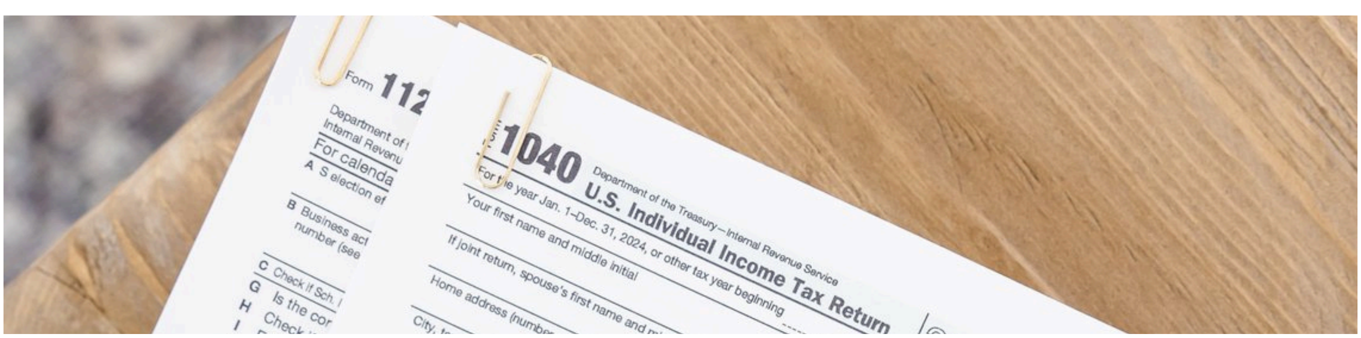
Individual Estimated Taxes

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, streamline business processes, and lower their tax liabilities.

WWW.VIRTUE-ACCOUNTING.COM