PREMIER ALLIANCE ADVISORY GROUP LLC

2026 Tax Preparation Checklist

Everything You Need to File with Confidence

Use this checklist as a general guide. Bring or securely submit only the items that apply to your tax situation.

Client Name: _____ Tax Year: 2026 _____

Appointment Date: _____ Preferred Contact: _____

1. Identity & Filing Information

☐ Government-issued photo ID for each taxpayer

☐ Social Security or ITIN information for taxpayer, spouse, and dependents

☐ Dates of birth for taxpayer, spouse, and dependents

☐ Prior-year federal and state tax returns, if available

☐ Bank routing and account information for direct deposit or payment

2. Income Documents

☐ W-2 wage statements

☐ 1099-NEC / 1099-MISC and other self-employment income forms

☐ 1099-INT / 1099-DIV / 1099-B investment income forms

☐ 1099-R retirement or pension distributions

☐ SSA-1099 Social Security benefits

☐ 1099-G unemployment or applicable government payments

☐ Rental, royalty, gig-work, or other income records

☐ Digital asset transaction records or applicable tax forms

3. Deductions & Credits

☐ Form 1098 mortgage interest statement

☐ Real estate tax records, if applicable

☐ Charitable contribution records

☐ Child/dependent care expenses and provider information

☐ Education expenses and Forms 1098-T / 1098-E

☐ Qualified medical or health-related records, if applicable

☐ Energy-efficient home improvement documentation, if applicable

4. Business & Self-Employment

☐ Business income records, sales reports, and 1099s

☐ Business expense records and receipts

☐ Business bank and credit card statements

☐ Mileage or vehicle-use records

☐ Asset and equipment purchases or disposals

☐ Home-office information, if applicable

☐ Payroll reports and contractor payment records

☐ Loan interest, rent, insurance, licenses, and professional fees

☐ Estimated tax payments made during the year

5. Health, Retirement & Other Items

- ☐ Form 1095-A for Marketplace health insurance, if applicable
- ☐ HSA forms and contribution/distribution records
- ☐ IRA or retirement contribution records
- ☐ Alimony documentation for agreements subject to applicable rules
- ☐ Estimated federal and state tax payment confirmations
- ☐ IRS or state tax notices received during the year

6. Life Changes to Mention

- ☐ Marriage, divorce, or legal separation
- ☐ Birth, adoption, or change in dependent status
- ☐ Home purchase, sale, or refinance
- ☐ Business startup, closure, or ownership change
- ☐ New rental property or major asset purchase/sale
- ☐ Change in employment or significant income
- ☐ Move to another state or work in multiple states

Business Owners:

If you use bookkeeping software, please have current reports and access information available. We may request additional records based on your entity type and tax return.

Secure Document Submission:

For your protection, do not email sensitive tax documents unless instructed to use an approved secure method. A personalized document request will be provided after onboarding.

Questions? We're here to help you get organized.

407-826-1481 | Ext. 1 • info@premierallianceadvisory.com

This checklist is a general preparation guide and does not replace individualized tax advice or a personalized document request.