

Tax Documents Checklist for 2027

For your 2026 tax return. Check each item as it arrives.

Moon Valley Accounting & Tax Services

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About you

- ☐ Photo ID for you and your spouse
- ☐ SSN or ITIN for everyone on the return
- ☐ Your 2025 tax return
- ☐ Bank routing and account numbers
- ☐ Identity Protection PIN (IP PIN), if you have one

Income

- ☐ W-2 from each employer
- ☐ 1099-NEC (contract work)
- ☐ 1099-MISC (rents, prizes, other income)
- ☐ 1099-K (card, app or marketplace payments)
- ☐ 1099-INT (interest)
- ☐ 1099-DIV (dividends)
- ☐ 1099-B (investments sold)
- ☐ 1099-R (pensions, retirement withdrawals)
- ☐ 1099-G (unemployment)
- ☐ SSA-1099 (Social Security)
- ☐ W-2G (gambling winnings)
- ☐ Digital asset sales with no form

New 2026 deductions

- ☐ Tips: W-2 box 12 code TP, or 1099
- ☐ Overtime: W-2 box 12 code TT, or 1099
- ☐ Car loan: Form 1098-VLI or lender statement, plus the VIN
- ☐ Age 65 or older by Dec. 31, 2026: SSN for each person

Deductions and credits

- ☐ 1098 (mortgage interest) and property tax
- ☐ 1098-E (student loan interest)
- ☐ 1098-T (tuition) and school receipts
- ☐ 1095-A (Marketplace insurance)
- ☐ Child care costs, plus provider name, address and tax ID (Form W-10)
- ☐ HSA: 5498-SA and 1099-SA
- ☐ Charity receipts (cash and items)
- ☐ IRA and retirement contributions
- ☐ Medical bills, if you itemize

Self-employed

- ☐ Business income records and bank or app statements
- ☐ Expense receipts
- ☐ Mileage log and car expenses
- ☐ 2026 estimated tax payments (federal and Arizona): dates and amounts

Report all of your income, even if you don't get a form. Form 5498-SA can arrive as late as May.