AgentLedger

2026 Tax Prep Packet for 1099 Pros

Everything your tax preparer will ask for, gathered on a few pages. Fill it in on screen or print it.

Free to use and share



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What to bring

Tick each one as you gather it

INCOME

- [ ] Forms 1099-NEC from clients
- [ ] Forms 1099-MISC and 1099-K (card processors and payment apps)
- [ ] My own record of all business income, including payments with no form
- [ ] Any W-2s, if I also had a job

EXPENSES

- [ ] Business expense totals by category (page 3), with receipts kept
- [ ] Mileage log: business miles, total miles for the year and the date the vehicle was first used for business
- [ ] Home office: square feet of the office and of the whole home
- [ ] Business phone, internet and software bills

PAYMENTS AND ACCOUNTS

- [ ] Estimated tax payments I made, with dates and amounts (page 5)
- [ ] Retirement plan contributions for 2026
- [ ] Health insurance premiums I paid myself
- [ ] Bank account and routing numbers for direct deposit or payment

LAST YEAR

- [ ] A copy of my 2025 tax return
- [ ] Any letters I received from the IRS or my state

Payments count as income whether or not a 1099 arrives. Your preparer may ask for more depending on your situation.

My 2026 business summary

One page for your preparer

ABOUT MY BUSINESS

Name _____

Business name and type of work _____

Phone and email _____

Expenses by category	Line	2026 total ($)
Advertising	8	
Car and truck expenses	9	
Commissions and fees	10	
Contract labor	11	
Insurance (other than health)	15	
Interest	16	
Legal and professional services	17	
Office expense	18	
Rent or lease	20	
Repairs and maintenance	21	
Supplies	22	
Taxes and licenses	23	
Travel	24a	
Business meals	24b	
Utilities	25	
Other expenses	27b	
Total expenses		

Line numbers from the 2026 Schedule C (Form 1040).

INCOME

Total business income ($) _____

On Forms 1099-NEC ($) _____

On Forms 1099-K ($) _____

With no form ($) _____

VEHICLE

Business miles _____

Total miles for 2026 _____

Date first used for business _____

HOME OFFICE

Office square feet _____

Whole home square feet _____

1099 match-up

Catch a missing or wrong form before you file

List every Form 1099 you received. Compare the amount on the form with your own records for that client. If they don't match, contact the client before you file.

Client or payer	Form	Amount on form ($)	My records ($)	Difference ($)	Notes
Totals					

CLIENTS WHO PAID ME BUT SENT NO FORM

Starting with 2026 payments, a business generally sends Form 1099-NEC only when it paid you $2,000 or more. Smaller payments still count as income: list them here.

Client _____

Client _____

Client _____

Client _____

Estimated payments I made

For the 2026 tax year

Your preparer needs the date and amount of every estimated payment. Find them in your bank records or your IRS online account.

Federal payment	Date paid	Amount ($)	Confirmation number
1st quarter: due April 15, 2026			
2nd quarter: due June 15, 2026			
3rd quarter: due September 15, 2026			
4th quarter: due January 15, 2027			
Total federal			

State or other payments	Date paid	Amount ($)	Confirmation number

NEXT YEAR, SKIP THE SCRAMBLE

AgentLedger tax trackers build these totals as you go: income by client, expenses by category, mileage, and your quarterly estimates. One workbook made for your line of work. See them at agentledgerllc.com/shop.

FOR TAX PROFESSIONALS

You're welcome to share this packet with your 1099 clients. Download it free at agentledgerllc.com/tools.