ADMIN ARCADE

TAX DOCUMENT CHECKLIST

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Life admin for people who hate it

Every form you wait on, **who sends it, and the date it's due to you.** Same forms every year, so keep this sheet and you won't start from scratch next time. Check off each step you clear for a ticket.

TAX YEAR	WHERE THE FORMS GO WHEN THEY LAND	WHO GETS THEM
_____	"The tax folder", "the red envelope". Somewhere you'd look first. _____	Accountant, software _____

#	THE STEP	WHAT YOU'RE DOING	DONE ON	CLEAR
1	**WHAT APPLIES THIS YEAR** Cross out the rest	Circle every form below you'll get this year A job, a mortgage, a bank account, a brokerage. Not sure? Circle it and cross it out later	DATE	☐
2	**WHO SENDS EACH ONE** Names only, no account numbers	Write the sender next to each circled form Two jobs means two W-2s. Use a blank row for the second one	DATE	☐
3	**CHECK IT OFF WHEN IT LANDS** Mail, online account, email	Check Got it and write where it came from Then it goes straight into the tax folder	DATE	☐
4	**CHASE THE LATE ONES** After the due date	Log in to the account, then ask the sender W-2 still missing at the end of February? The IRS line is 800-829-1040	DATE	☐
5	**HAND IT OVER** Accountant or tax software	Check Handed over as each one goes Then keep this sheet. Next year's list is already written	DATE	☐

EVERY FORM I WAIT ON

CIRCLE YOURS Cross out the ones you don't get

FORM And what it's for		WHO SENDS IT Employer, bank, lender	DUE TO ME BY See the box below	GOT IT	WHERE IT CAME Mail, online, email	HANDED OVER
W-2	A paycheck from a job		Jan 31	☐		☐
1099-NEC	Paid as a freelancer or contractor		Jan 31	☐		☐
1099-MISC	Rent, prizes, royalties, other income		Jan 31	☐		☐
1099-K	Paid through an app or marketplace		Jan 31	☐		☐
1098	Mortgage interest		Jan 31	☐		☐
1099-INT	Bank or savings interest		Jan 31	☐		☐
1099-G	Unemployment or a state tax refund		Jan 31	☐		☐
CONSOLIDATED 1099	Brokerage: DIV, INT and B in one		Feb 15	☐		☐
1099-DA	Crypto sold on an exchange		Feb 15	☐		☐
SCHEDULE K-1	Own part of a partnership or S corp		Mar 15	☐		☐
1099-S	Sold a house or other real estate		Feb 15	☐		☐
1099-R	Retirement account or pension		Jan 31	☐		☐
1099-SA	Money out of an HSA		Jan 31	☐		☐
SSA-1099	Social Security benefits		Jan 31	☐		☐
1095-A	Marketplace health insurance		Mid-Feb	☐		☐
1098-E	Student loan interest		Jan 31	☐		☐
1098-T	College tuition		Jan 31	☐		☐
1099-Q	Money out of a 529 plan		Jan 31	☐		☐
W-2G	Gambling winnings		Jan 31	☐		☐
1099-C	A canceled or forgiven debt		Jan 31	☐		☐
DONATION RECEIPTS	$250+ needs a written note		Yours	☐		☐
CHILD CARE	Total paid + provider's tax ID		Yours	☐		☐
IP PIN	Only if the IRS gave you one		Yours	☐		☐
LAST YEAR'S RETURN	Federal and state		Yours	☐		☐
				☐		☐

DUE DATES, CHECKED OCTOBER 2026

1 Jan 31: most forms
W-2s, W-2Gs, the 1098s and most 1099s.

2 Later ones
Feb 15: consolidated 1099, 1099-DA, 1099-S. Mid-Feb: 1095-A. Mar 15: Schedule K-1.

3 Weekend or holiday?
It moves to the next business day. For 2026 forms: Feb 1 and Feb 16, 2027.

STEPS CLEARED ___ / 5

One ticket per step you clear, so five tickets for finishing the sheet. A step where the honest answer was **nothing here** still counts.

LATE? LOG IN BEFORE YOU CALL

Banks, brokerages, lenders and payment apps post tax forms in your online account, under Documents or Tax forms. Look there first.

KEEP THIS SHEET FOR NEXT YEAR

Put it in the front of the tax folder. Next January, the list of forms and senders is already here. Just check them off again.

Not tax, financial or legal advice, and not from a tax professional. This lists which forms to expect and when. Your accountant or tax software decides what to do with them. · adminarcade.com