



## Welcome to the 2026 Tax Season with Syreeta Inc!

Can you believe it? The 2026 tax season is already here! 😅 (Yep... that means you're filing taxes for 2025 📆)

Just when you thought you could ease into the new year, here comes Uncle Sam with new IRS rules, fresh deduction limits, shifting thresholds, and a few curveballs to keep things interesting for both individuals and small business owners alike.

But no worries, I've got you covered! 🎙 Here's the Game Plan:

Starting tomorrow thru Thur. Feb. 12, I'll be dropping bite-sized, practical Tax Tips every Tuesday & Thursday to help you feel prepared, organized, and maybe even a little empowered this tax season. 📁💡

### Each tip is:

- ⌚ Focused on real-life scenarios for individuals, entrepreneurs, and self-employed pros
- 📘 Packed with simple explanations of the latest tax law changes
- 🧠 Strategically designed to save you money and reduce stress
- NEW What's New for the 2026 Tax Season?

This year, we're seeing:

- ⌚ Updated standard deduction limits
- 🚗 New mileage rates for business, medical, and moving
- 💸 QBI phase-out adjustments for small businesses
- 📱 More scrutiny around third-party payment platforms like CashApp and Venmo
- 🍽️ Refined guidance for business meal deductions

Whether you're filing as a W-2 employee with side gigs, a full-time entrepreneur, or a head of household maximizing deductions, these tips will help you take action early and avoid the chaos of last-minute filing.

Welcome to The Tax Navigator: Guiding You Through the 2026 Filing Season 💰✓

IN THIS NEWSLETTER
How to Access your IRS Online Account
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Important Tax Deadline Dates
IRS ONLINE TOOLS

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## Access IRS Online Account for helpful information

Need to track who reported your income to the IRS or struggling to locate your tax forms? You can find all your tax-related information for the 2026 filing season and even for past years, by setting up or accessing your [IRS Online Account](#). If you're a new user, just have your photo ID handy for identity verification. Through your IRS Online Account, you can:

- View key details from their most recent tax return, such as adjusted gross income.
- Request an Identity Protection PIN.
- Get account transcripts to include wage and income records.
- Sign tax forms like powers of attorney or tax information authorizations.
- View and edit language preferences and alternative media (such as braille, large print, etc.).
- Receive and view over 200 IRS electronic notices.
- View, make and cancel payments.
- Set up or change payment plans and check their balance.

## Can I Use My Last Paycheck?

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Unfortunately, with all these new healthcare tax laws, the information on your W2 may have year-end adjustments, additions, etc. that don't match what's on your year-end pay stub.

Also, your employer's federal tax id is required to file and the majority of the time it's not listed on your paycheck stub. So, if you started a new job, and that employer isn't already in your tax preparers system (that would be "ME" \*wink\*) then you will have to wait for your W2.

The only time you're allowed to use your last pay stub to file is if you haven't received your W2 by February 15 and efforts to obtain your W2 from your employer have failed.

Besides, if you have a mortgage, rental property, in school/children in school or have had any settlements, investments, sold stock, you need to wait until you receive ALL tax-related material to file.



# Gather and Organize Tax Documents

Tax season can be overwhelming with its myriad of forms, deadlines, and potential deductions. However, a well-organized system for tracking tax documents can simplify the process, reduce errors, and ensure accurate returns. This not only eases stress but also helps uncover possible deductions or credits.



## Start Early

The secret to maintaining order during tax season is to begin preparations well in advance. Procrastination is common, but it usually results in a frantic scramble and possible errors as the deadline looms. Plan to start collecting and organizing your tax documents several weeks before they are due to minimize stress and errors.

## Create a Checklist

A detailed checklist is a straightforward yet powerful tool to ensure you have all necessary documents for your tax filing. Include items like W-2 forms, 1099 forms, receipts for charitable contributions, and any other relevant records. Tick off each item as you collect them to avoid overlooking any essential documents. [CLICK HERE TO DOWNLOAD CHECKLIST](#)

## Utilize Technology

With technology with software (ie: Quickbooks) and apps (Odoo.com) that scan receipts, create expense reports, and track mileage. These tools save time and reduce the risk of losing important documents.

## Categorize Your Expenses

Categorizing expenses into groups like business, medical, and charitable donations is key for staying organized and maximizing deductions. This approach simplifies document retrieval and enhances the monitoring of expenses in each category.

## Keep a Record of Important Dates

Record crucial dates, such as deadlines for tax filings and estimated tax payments, to stay on schedule and avoid penalties. Setting calendar reminders or using tax software that alerts you to upcoming due dates can be particularly effective.

## Stay on Top of Income and Expenses

Regular monitoring of your income and expenses throughout the year is essential not only for tax preparation but also for effective budgeting and future planning. Accounting software can be incredibly useful for tracking these figures and managing your cash flow. Most income is taxable, including unemployment compensation, refund interest and income from the gig economy and digital assets. Be sure to watch for and gather essential forms, such as Forms W-2, Wage and Tax Statement, and other income documents.

## Be Mindful of Deadlines

Staying aware of tax deadlines is essential to avoid severe consequences like fines and penalties. Proactively mark important dates on your calendar and take timely action to prevent any issues.

It's also important to notify the IRS of any address changes and the Social Security Administration of any legal name changes. By implementing these strategies, you can transform tax season from a stressful ordeal into a manageable, and possibly even rewarding, task.

## Key Federal Tax Dates to Know in 2026



### 2026 Federal Tax Filing Deadlines

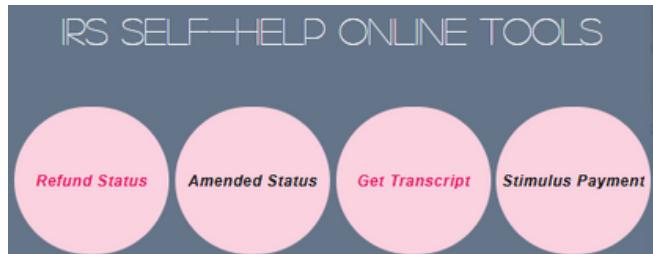
- **1040 (Individual Tax Returns)**
  - **Initial Filing Deadline:** April 15, 2026
  - **Extension Deadline:** October 15, 2026
- **1065 (Partnership Returns)**
  - **Initial Filing Deadline:** March 16, 2026 (*March 15 is a Sunday*)
  - **Extension Deadline:** September 15, 2026
- **1120-S (S Corporation Returns)**
  - **Initial Filing Deadline:** March 16, 2026
  - **Extension Deadline:** September 15, 2026
- **1120 (C Corporation Returns)**
  - **Initial Filing Deadline:** April 15, 2026
  - **Extension Deadline:** October 15, 2026
- **990 (Non-Profit Organizations)**
  - **Initial Filing Deadline:** May 15, 2026
  - **Extension Deadline:** November 16, 2026 (*November 15 is a Sunday*)
- **1041 (Estates and Trusts)**
  - **Initial Filing Deadline:** April 15, 2026
  - **Extension Deadline:** September 30, 2026

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### Other Key Dates to Know for 2026

- **January 15, 2026:** Fourth Quarter 2025 Estimated Tax Payment Due
- **January 31, 2026:**
  - W-2 and 1099-NEC forms due to recipients
  - Employers must furnish W-2s to employees
- **March 2, 2026:** Paper submission deadline for most 1099s to IRS (if not e-filing)
- **March 31, 2026:** E-filing deadline for 1099s to IRS
- **June 15, 2026:** Second Quarter 2026 Estimated Tax Payment Due
- **September 15, 2026:** Third Quarter 2026 Estimated Tax Payment Due

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## IRS ONLINE TOOLS

Need to check the status of your current or past tax refund (up to 2023)? Looking to amend a return or contact the IRS quickly?

The IRS provides a variety of online tools to help you get the answers you need. Click below:



### Online tools and resources

You can get help online with self-service options.

 **Check refund status**

 **Get a tax transcript**

 **File a return**

 **Payments and penalties**

 **Letter from the IRS**

 **Correct or amend a return**

 **Identity theft, fraud and scams**

 **Business topics**

**QUESTIONS?  
GIVE ME A  
JINGLE**

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NEW & NOTABLE TAX  
CHANGES FOR 2025  
FILING SEASON

*Thank you for reading!*