

Every tax return tells a story.  
Some are just more dramatic.

## A Fresh Year, A Good Time to Plan

A new year brings fresh goals, fresh calendars, and the annual reminder that tax season always arrives sooner than expected. As we welcome 2026, our focus remains the same: clear guidance, dependable service, and steady reassurance—no matter how organized (or not) you feel right now.

Over the years, we've learned that tax season is much easier when there's a plan in place. Whether you're filing a personal return, running a business, or trying to remember where that one important form went, preparation makes all the difference. Taxes work best when they're part of an overall strategy—not a last-minute scavenger hunt.

**"An extension gives you more time to file — not more time to pay."**

This is one reminder worth repeating. Filing an extension allows extra time to submit your return, but any taxes owed are still due by the April deadline. Extensions delay paperwork—not payments—so planning ahead helps avoid penalties, interest, and surprises.

Staying organized can also make tax season far more manageable. Our Tax Organizer and secure client portal are designed to simplify document gathering and submission, saving time and back-and-forth.

We also offer flexible options like document drop-off, secure electronic delivery, and digital signatures—so working with us fits your schedule.

Thank you for trusting Lindstrom Accountancy Corporation. We look forward to working with you throughout 2026.

## 2026 Deadlines

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STARTED OR INCORPORATED  
A BUSINESS IN 2025?

LET US KNOW—BUSINESS  
TAX RETURNS ARE DUE  
MARCH 15, 2026.

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INDIVIDUAL TAX RETURNS  
& PAYMENTS DUE  
APRIL 15, 2026

EXTENSIONS EXTEND FILING —  
NOT PAYMENT.

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NEED AN EXTENSION?  
CONTACT US BEFORE  
APRIL 15, 2026.

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ESTIMATED TAX PAYMENTS  
DUE QUARTERLY  
APRIL 15, 2026  
JUNE 15, 2026  
SEPTEMBER 15, 2026  
JANUARY 15, 2027

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# Tax Organizer

If we don't already have this information, please bring your ID and Social Security Card with you at the time of your appointment.

We are still offering a portal. If interested, you can access your organizer and tax returns through the portal. To request an organizer or access to the portal, please call or email us.

## Medical

- Prescriptions
- Doctor, Dentist
- Hospital, Nursing Homes
- Health Insurance Premiums
- Medical Mileage
- Medical Meals
- Long-Term Care Insurance

## Personal Property

- DMV Renewal
- Vehicle 1
- Vehicle 2
- Other

## Taxes

- Property Taxes
- Personal Residence
- Vacation Home
- Other

## Miscellaneous - May not be a Federal deduction

- Professional / Union Dues
- Tax Preparation Fees
- Safe Deposit Box
- Continuing Education
- Daycare Expenses
- Job Seeking Expenses
- Uniform / Cleaning
- Safety / Protective Equipment
- Job Supplies
- Trade Publications
- Investment Expenses
- Gambling Expenses
- Other Job Expenses

## Contributions

- Cash / Checks
- Church
- Charities
- Non-Cash\*
- Goodwill, etc...
- Charity Miles

\* If non-cash contributions exceed \$500, you must make an itemized list of what was donated, when it was donated, when it was purchased, how much it cost, and what was its worth when donated.

## Estimated Tax Payments

### Federal Estimated Taxes

04/15/25 date Paid \_\_\_\_\_ Amount \_\_\_\_\_  
06/15/25 date Paid \_\_\_\_\_ Amount \_\_\_\_\_  
09/15/25 date Paid \_\_\_\_\_ Amount \_\_\_\_\_  
12/15/25 date Paid \_\_\_\_\_ Amount \_\_\_\_\_

### State Estimated Taxes

04/15/25 date Paid \_\_\_\_\_ Amount \_\_\_\_\_  
06/15/25 date Paid \_\_\_\_\_ Amount \_\_\_\_\_  
09/15/25 date Paid \_\_\_\_\_ Amount \_\_\_\_\_  
12/15/25 date Paid \_\_\_\_\_ Amount \_\_\_\_\_