

Year-End Business Tax Planning Guide

Business Tax Guides | Guide | Tax year 2026 | Updated October 15, 2026

Prepare questions and reports before year-end tax planning.

Who should use this resource?

Designed for small business readers who want to organize records and prepare informed questions.

What this resource covers

1. Review year-to-date profit and cash flow
2. Identify unpaid invoices and outstanding bills
3. Discuss asset purchases and payroll changes before acting
4. Check estimated payments against expected liability

How to use it

Work through each item using your own records. Mark items complete as you gather documents or finish a review. Keep original source records securely and check current instructions before filing or paying taxes.

Review checklist

- ☐ Review year-to-date profit and cash flow
- ☐ Identify unpaid invoices and outstanding bills
- ☐ Discuss asset purchases and payroll changes before acting
- ☐ Check estimated payments against expected liability

Common mistakes to avoid

Do not rely on an earlier year's rule, estimate figures without source documents, or treat this worksheet as an official tax form. Verify current instructions before filing or paying.

Official references

IRS Small Business and Self-Employed Tax Center: <https://www.irs.gov/businesses/small-businesses-self-employed>

IRS: Estimated taxes: <https://www.irs.gov/businesses/small-businesses-self-employed/estimated-taxes>

NetFintax educational material. Not an official IRS or Nevada form. Requirements and eligibility depend on your facts and current law; consult official instructions or a qualified professional before acting.