

Estimated Tax Payment Worksheet

Self-Employment & Freelancers | Worksheet | Tax year 2026 | Updated October 15, 2026

Organize income estimates, withholding, and payments for a tax discussion.

Who should use this resource?

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

What this resource covers

1. Estimate annual income and expenses
2. Record withholding and payments already made
3. Compare your figures with current IRS Form 1040-ES instructions
4. Confirm any payment amount and due date before sending funds

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

- ☐ Estimate annual income and expenses
- ☐ Record withholding and payments already made
- ☐ Compare your figures with current IRS Form 1040-ES instructions
- ☐ Confirm any payment amount and due date before sending funds

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

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