

2026 Tax Organizer

Personal Information

**PLEASE BRING ALL TAX DOCUMENTS
TO YOUR APPOINTMENT**

INCLUDING ALL PAGES OF ALL FORMS
SUCH AS 1099-R, 1099 COMPOSITE,
1099-INT, 1099-MISC, ET CETERA.

Personal Information

Full Name (First, Middle, Last)		SSN	IP PIN (if applicable)	Date of Birth
Taxpayer:				
Spouse:				
Name of person to whom all information should be addressed, if not the taxpayer: _____				
Street address (number and street): _____				
City: _____		State: _____	ZIP: _____	
	Occupation	Daytime Phone	Evening Phone	Cell Phone
Taxpayer:				
Spouse:				
Taxpayer email: _____				
Spouse email: _____				

Filing Status and General Information

Filing status at the end of 2026 (check one):

☐ Single ☐ Married ☐ Widowed – If widowed and your spouse died after December 31, 2024, enter the date of death: _____

☐ Married filing separately – If married but filing separately, did you live apart from your spouse for the last six months of 2026? ☐ Yes ☐ No

Yes No

☐ ☐ Are you or your spouse blind?

☐ ☐ Are you or your spouse disabled?

☐ ☐ Are you or your spouse a full-time student?

☐ ☐ Do you or your spouse want to designate \$3 to go to the Presidential Election Campaign Fund?

At any time during 2026 did you:

☐ ☐ (a) receive (as a reward, award, or payment for property or service) a digital asset?

☐ ☐ (b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)?

Identification Information

Taxpayer's type of photo ID (check one):

☐ Driver's license ☐ State-issued photo ID

Photo ID number: _____

State photo ID was issued: _____

Date photo ID was issued: _____

Date photo ID expires: _____

Spouse's type of photo ID (check one):

☐ Driver's license ☐ State-issued photo ID

Photo ID number: _____

State photo ID was issued: _____

Date photo ID was issued: _____

Date photo ID expires: _____

Account Information for Deposits and Withdrawals

Name of Bank	Routing Number	Account Number	Type of Account (Checking or Savings)	Use this Account for:	
				Deposits	Withdrawals
				☐	☐
				☐	☐

Appointment Information

Your 2026 appointment is scheduled for: Date: _____ Time: _____ In person / Phone / Virtual (circle one)

Additional notes: _____

WHAT CHANGED IN 2026?

Check anything that applies. This page helps us spot issues before we begin preparing the return.

- | | |
|---|--|
| ☐ Married, divorced, separated, or widowed | ☐ New child, dependent, adoption, or custody change |
| ☐ Bought or sold a home | ☐ Moved into or out of Arizona |
| ☐ Started, purchased, or sold a business | ☐ Bought, sold, or converted rental property |
| ☐ Retired or began Social Security | ☐ Large IRA/pension distribution or rollover |
| ☐ Inherited property, investments, or money | ☐ Made a large gift to any person |
| ☐ Bought a new vehicle with a loan | ☐ Received qualified tips |
| ☐ Received qualified overtime pay | ☐ Cryptocurrency / digital asset transactions |
| ☐ Marketplace health insurance (Form 1095-A) | ☐ Received an IRS or ADOR notice |
| ☐ Foreign account, asset, trust, or ownership interest | ☐ Major casualty/disaster loss |
| ☐ New household employee | ☐ Other major financial change |

Notices - Please Bring ALL Pages

- ☐ Yes ☐ No Did you receive any IRS or Arizona Department of Revenue notice during 2026 or relating to a prior year?

Agency / notice number / tax year: _____

Brief description: _____

Arizona Tax Credits

If you made an Arizona tax-credit contribution, bring the receipt showing the organization, date, and amount.

- | | |
|---|--|
| ☐ Qualifying Charitable Organization (QCO) | ☐ Qualifying Foster Care Charitable Organization (QFCO) |
| ☐ Public School Tax Credit | ☐ School Tuition Organization (STO) |
| ☐ Other Arizona credit organization | |

2026 Special Items

- ☐ Yes ☐ No Did you receive qualified tips reported on Form W-2 or another employer/payor statement?
- ☐ Yes ☐ No Did you receive qualified overtime compensation?
- ☐ Yes ☐ No Did you pay interest on a loan for a qualifying new passenger vehicle purchased for personal use?
- ☐ Yes ☐ No Were you age 65 or older at the end of 2026?
- ☐ Yes ☐ No Did you make qualifying cash charitable contributions even if you do not normally itemize?
- ☐ Yes ☐ No Do you have a child eligible for a Trump Account or the \$1,000 pilot contribution?

DEPENDENTS, ESTIMATES & DOCUMENT CHECKLIST

Dependent Information

Name	Relationship	DOB	SSN	Months home	Student?	IP PIN

Child / Dependent Care

Provider	Address	SSN/EIN	Amount paid

2026 Estimated Tax Payments

Payment	Date / Amount	Payment	Date / Amount
Federal		Arizona	
Q1		Q1	
Q2		Q2	
Q3		Q3	
Q4		Q4	
Other		Other	

New Client - Prior-Year Records

- | | |
|--|--|
| ☐ 2024 and 2025 federal and state returns | ☐ Depreciation schedules for business/rental assets |
| ☐ Capital-loss carryforward worksheets | ☐ NOL carryforward worksheets |
| ☐ Passive activity loss carryforwards | ☐ Charitable contribution carryforwards |
| ☐ Basis schedules for S corporations / partnerships | ☐ Foreign tax / AMT / business credit carryforwards |
| ☐ Prior IRS / state notices still unresolved | |

2026 DOCUMENT CHECKLIST

Income and Other Documents

- | | |
|--|--|
| ☐ W-2 wage statements | ☐ 1099-R pensions / IRA distributions |
| ☐ SSA-1099 Social Security | ☐ 1099-INT interest |
| ☐ 1099-DIV dividends | ☐ 1099-B brokerage statements - all pages |
| ☐ 1099-DA digital asset statements | ☐ 1099-MISC / 1099-NEC |
| ☐ 1099-K payment apps / marketplaces | ☐ 1099-G unemployment / government payments |
| ☐ Schedule K-1 and all attachments | ☐ Schedule K-3, if received |
| ☐ 1099-S real estate sales | ☐ Closing statements for property purchases/sales |
| ☐ Business income and expense records | ☐ Rental income and expense records |
| ☐ Farm income and expense records | ☐ Gambling W-2G and loss records |
| ☐ Cancellation-of-debt forms | ☐ HSA Forms 1099-SA / 5498-SA |
| ☐ Education Form 1098-T | ☐ Student loan Form 1098-E |
| ☐ Marketplace Form 1095-A | ☐ Mortgage Form 1098 |
| ☐ Charitable contribution receipts | ☐ Arizona tax-credit receipts |
| ☐ Property tax statements | ☐ Vehicle purchase / loan documents |
| ☐ Energy-credit documents if applicable | ☐ Any other income documents |
| ☐ IRS / ADOR correspondence - all pages | |

Digital Assets

☐ Yes ☐ No At any time during 2026 did you receive, sell, exchange, gift, or otherwise dispose of cryptocurrency, stablecoins, NFTs, or another digital asset / financial interest in a digital asset?

If yes, provide Forms 1099-DA and complete transaction records, including basis when available.

Foreign Reporting

- ☐ Yes ☐ No Did you have a financial interest in or signature authority over a foreign financial account?
- ☐ Yes ☐ No Did the aggregate value of foreign accounts exceed \$10,000 at any time during 2026?
- ☐ Yes ☐ No Did you own foreign property, receive foreign income, pay foreign tax, own a foreign entity, or have a foreign trust transaction?

2026 TAX QUESTIONNAIRE

Personal / Income / Property

- ☐ Yes ☐ No Did your marital status, name, or address change during the year?
- ☐ Yes ☐ No Can you or your spouse be claimed as a dependent by someone else?
- ☐ Yes ☐ No Were you, your spouse, or a dependent issued an IRS Identity Protection PIN?
- ☐ Yes ☐ No Did you have changes in dependents, custody, support, or living arrangements?
- ☐ Yes ☐ No Did you pay child or dependent care expenses?
- ☐ Yes ☐ No Did you have adoption expenses?
- ☐ Yes ☐ No Did any household member have Marketplace health insurance? If yes, provide Form 1095-A.
- ☐ Yes ☐ No Did you receive tips not fully reported to an employer?
- ☐ Yes ☐ No Did you receive disability income?
- ☐ Yes ☐ No Did you start, acquire, sell, or close a business?
- ☐ Yes ☐ No Did you purchase or dispose of business assets?
- ☐ Yes ☐ No Did you buy, sell, exchange, or refinance real estate?
- ☐ Yes ☐ No Did you rent out your home or use part of it regularly and exclusively for business?
- ☐ Yes ☐ No Did you acquire or dispose of an interest in a partnership or S corporation?
- ☐ Yes ☐ No Did you have debt canceled or forgiven?
- ☐ Yes ☐ No Did anyone owe you money that became uncollectible?
- ☐ Yes ☐ No Did you receive gig, freelance, rideshare, delivery, short-term rental, online-sale, or crowdfunding income?
- ☐ Yes ☐ No Did you receive income not otherwise listed in this organizer?

Retirement / Education

- ☐ Yes ☐ No Did you contribute to an IRA, Roth IRA, SEP, SIMPLE, 401(k), or other retirement plan?
- ☐ Yes ☐ No Did you receive a retirement-plan or IRA distribution?
- ☐ Yes ☐ No Did you complete a rollover or Roth conversion?
- ☐ Yes ☐ No Did you make a Qualified Charitable Distribution (QCD) from an IRA?
- ☐ Yes ☐ No Did you pay college, university, vocational, credentialing, or student-loan expenses?
- ☐ Yes ☐ No Did you contribute to or receive a distribution from a 529 plan, ESA, or other education account?

2026 TAX QUESTIONNAIRE - CONTINUED

Itemized Deductions / Other

- ☐ Yes ☐ No Did you pay out-of-pocket medical or dental expenses?
- ☐ Yes ☐ No Did you pay long-term care premiums?
- ☐ Yes ☐ No Did you pay real estate or personal property taxes?
- ☐ Yes ☐ No Did you pay mortgage or investment interest?
- ☐ Yes ☐ No Did you make cash charitable contributions?
- ☐ Yes ☐ No Did you make noncash charitable contributions?
- ☐ Yes ☐ No Did you donate a vehicle or boat?
- ☐ Yes ☐ No Did you have gambling winnings or losses?
- ☐ Yes ☐ No Did you have a casualty or theft loss in a federally declared disaster area?
- ☐ Yes ☐ No Did you pay wages to a household employee?
- ☐ Yes ☐ No Did you make gifts to any one person in excess of \$19,000 during 2026?
- ☐ Yes ☐ No Did you receive more than \$10,000 in cash in a trade or business transaction?
- ☐ Yes ☐ No Did you own or dispose of an interest in a Qualified Opportunity Fund?
- ☐ Yes ☐ No Did you receive any tax notices not already provided?

Refund / Payment Preferences

- ☐ Yes ☐ No If you have an overpayment, do you want it applied to 2027 estimated tax?
- ☐ Yes ☐ No Do you want a refund directly deposited and/or a balance due directly withdrawn?
- Provide current bank information. Do not assume the account used in a prior year is still correct.
- ☐ Yes ☐ No Do you anticipate 2027 income or withholding to be materially different from 2026?

Preparer Notes

INCOME WORKSHEET

Provide all copies of Forms W-2 and 1099-R.

Wages & Salaries

T/S	Employer	2026 wages

Retirement Income

T/S	Payer	2026 distribution

☐ Yes ☐ No Did you make a QCD from an IRA?

☐ Yes ☐ No Did you complete a rollover or Roth conversion?

INTEREST, DIVIDENDS & INVESTMENTS

Interest Income

T/S/J	Payer / account	Interest

Dividend Income

T/S/J	Payer / account	Ordinary	Qualified

Capital Asset Sales Not Fully Reported by Broker

Description	Acquired	Sold	Proceeds	Basis

OTHER INCOME & ADJUSTMENTS

Other Income		
Item	Taxpayer	Spouse
Social Security benefits		
State tax refund		
Unemployment compensation		
Gambling winnings		
Alimony received (if taxable under applicable decree)		
Jury duty / scholarships / grants		
Other		
Other		

Adjustments / Contributions		
Item	Taxpayer	Spouse
HSA contributions		
Self-employed health insurance		
SEP / SIMPLE / Solo 401(k)		
Traditional IRA		
Roth IRA		
Student loan interest		
Other		

SCHEDULE C - BUSINESS

Business Information

Business / profession	
Business name / EIN	
Business address	
Accounting method	Cash ☐ Accrual ☐ Other ☐
Started/acquired/disposed during 2026	

☐ Yes ☐ No Did you pay any nonemployee \$600 or more for services?

☐ Yes ☐ No Were all required Forms 1099 filed?

Income / Expenses

Category	2026 amount
Gross receipts	
Returns / allowances	
Other income	
Advertising	
Car / truck	
Commissions / fees	
Contract labor	
Employee benefits	
Insurance	
Interest	
Legal / professional	
Office expense	
Pension / profit-sharing	
Rent / lease	
Repairs / maintenance	
Supplies	
Taxes / licenses	
Travel	
Meals	
Utilities	
Wages	
Other	

SCHEDULE E - RENTAL REAL ESTATE / ROYALTIES

Property Information

Property description	
Address	
Type	☐ Single family ☐ Multi-family ☐ Commercial ☐ Short-term ☐ Land ☐ Royalty ☐ Other
Days rented / personal use	
Placed in service or disposed during 2026	

☐ Yes ☐ No Did you pay a nonemployee \$600 or more for services related to this rental?

Income / Expenses

Category	2026 amount
Rent / royalty income	
Advertising	
Auto / travel	
Cleaning / maintenance	
Commissions	
Insurance	
Legal / professional	
Management fees	
Mortgage interest	
Other interest	
Repairs	
Supplies	
Taxes	
Utilities	
Other	

K-1 / PASS-THROUGH ENTITIES

Provide every Schedule K-1 and all attached statements, including Schedule K-3 if received.

T/S/J	Entity name	EIN

Basis / Carryover Information

- ☐ S corporation stock/debt basis schedule
- ☐ Partnership outside basis schedule
- ☐ At-risk carryover
- ☐ Passive activity loss carryover
- ☐ Excess business loss / NOL carryover
- ☐ Prior suspended deductions

BUSINESS VEHICLE & HOME OFFICE

Vehicle

Business / activity	
Vehicle description	
Date placed in service	

2026 mileage - keep the two periods separate because the IRS rate changed July 1, 2026.

Business miles 1/1/26 - 6/30/26	
Business miles 7/1/26 - 12/31/26	
Commuting miles	
Other / personal miles	

☐ Yes ☐ No Do you have written records or other evidence supporting the mileage?

Actual Vehicle Expenses (if applicable)

Gas / fuel	
Insurance	
Repairs	
Tires	
Licenses / registration	
Parking / tolls	
Lease / rental	
Interest	
Other	

Business Use of Home

Business / activity	
Total home square footage	
Square footage used regularly and exclusively for business	
Mortgage interest / rent	
Real estate taxes	
Insurance / utilities / repairs	

HOUSEHOLD EMPLOYMENT - 2026

For 2026, Social Security and Medicare taxes generally apply if you paid **\$3,000 or more in cash wages to any one household employee.**

☐ Yes ☐ No Did you pay any one household employee \$3,000 or more in cash wages during 2026?

☐ Yes ☐ No Did you withhold federal income tax for a household employee?

☐ Yes ☐ No Did you pay total cash wages of \$1,000 or more in any calendar quarter of 2025 or 2026 to all household employees?

Employee name	SSN	Cash wages	FIT withheld

Provide payroll records and state unemployment information, if applicable.

ITEMIZED DEDUCTIONS & CHARITABLE CONTRIBUTIONS

Beginning in 2026, qualifying cash charitable contributions may matter even for taxpayers who do not itemize. Please provide receipts.

Medical / Taxes / Interest

Health insurance premiums paid personally	
Medicare premiums	
Long-term care premiums	
Doctors / dentists / prescriptions	
Other medical / dental	
Medical mileage	
State / local income tax paid	
General sales tax on major purchases	
Real estate taxes	
Personal property tax	
Mortgage interest (attach Form 1098)	
Investment interest	

Charitable Contributions

Organization	Cash	Noncash

Charitable mileage: _____

HSA, EDUCATION & OTHER INFORMATION

Health Savings Account

Coverage	☐ Self-only ☐ Family
2026 HSA contributions	
2026 HSA distributions	
Amount rolled over	
Qualified medical expenses paid from distributions	

Education

Provide all Forms 1098-T and records of qualified education / credentialing expenses.

Student	School / expense	Amount

Gifts / Estate / Inheritance

☐ Yes ☐ No Did you make gifts to any one person exceeding \$19,000 during 2026?

☐ Yes ☐ No Did you receive an inheritance or become beneficiary/executor/trustee of an estate or trust?

Details: _____

FINAL REVIEW & CLIENT NOTES

Before You Submit This Organizer

- | | |
|--|--|
| ☐ All W-2s and 1099s included | ☐ All pages of brokerage composite statements included |
| ☐ All K-1 attachments included | ☐ All IRS / ADOR notices included |
| ☐ Prior-year returns and carryover schedules included | ☐ Bank information verified |
| ☐ Dependent SSNs / DOBs / IP PINs verified | ☐ Arizona tax-credit receipts included |
| ☐ Marketplace Form 1095-A included, if applicable | ☐ Vehicle purchase / loan documents included, if applicable |

Questions / Notes for Lenny

Thank you. A complete organizer and complete document package help us spend our time preparing and reviewing your return instead of chasing missing pieces.

Prepared for 2026 individual income tax return intake. Tax rules and forms may change; this organizer is a document-gathering aid and is not a substitute for professional review.