

2026 Individual Taxpayer Organizer

Taxpayer					SSN	
First Name	M.I.	Last Name	Email		IP PIN	
Occupation	Date of birth		Are you new to our firm? Yes No			
Address	City		State	Zip		
County	Home phone		Work or cell			
Driver's License No.	State		Issue Date	Exp. Date		
Spouse					SSN	
First Name	M.I.	Last Name	Email		IP PIN	
Occupation	Date of birth		Are you new to our firm? Yes No			
Address (If different from Taxpayer)	City		State	Zip		
County	Home phone		Work or cell			
Driver's License No.	State		Issue Date	Exp. Date		
If you moved during 2026, enter your previous address.					Date of move	
Marital status at 12/31/26 : Single Married Separated Widow(er) Registered Domestic Partnership (RDP) Unsure						
Were you divorced or separated during the year? Yes No Were there any deaths in the family? Yes No						
Individuals who are in registered domestic partnerships (RDPs) and civil unions are not considered married for federal tax purposes.						
Have you received any notice from the IRS or state revenue department within the past year? Yes No						
Names of dependent children Child's full name	Social Security #	IP PIN	Date of birth	Months lived in home in 2026	Relationship to taxpayer	College student?
Did any of the children have unearned income above \$1,350 for the year? Yes No Do any of the children have a disability? Yes No						
Is it anticipated that a different taxpayer will seek to claim a child listed above as their dependent for tax year 2026? Yes No						
Other dependents or people who lived with you						
Name	Social Security #	IP PIN	Date of birth	Months lived in home in 2026	Relationship	Income
Bank information: Use for Direct deposit of refund Direct debit of balance due Name of bank						
Checking Savings	Routing transit number		Account number			
Ask your tax preparer for information about depositing a refund into an IRA account or splitting the deposit into more than one account.						

Questions — All Taxpayers										(Provide related statements or other documentation.)	
"You" refers to both taxpayer and spouse — enter "?" if unsure about a question.											
LIFESTYLE & TAXES	Yes	No	Are either you or your spouse legally blind?								
	Yes	No	Did you pay or receive alimony in 2026? <i>Paid Received \$</i>				Recipient's SSN		Date of divorce or separation		
	Yes	No	Did you purchase health insurance through a public exchange?								
	Yes	No	Will there be any significant changes in income or deductions next year, such as retirement?								
	Yes	No	Did you pay anyone for domestic services in your home?								
	Yes	No	Did you purchase a new energy-efficient car, truck, or van?								
	Yes	No	Are you involved in bankruptcy, foreclosure, repossession, or had any debt (including credit cards) cancelled?								
	Yes	No	Are you a member of the military?				State of residency				
	Yes	No	Were you a citizen of or lived in a foreign country?				Foreign country				
	Yes	No	Do you own or have financial interest in a foreign bank or financial account? Balance exceeds \$50,000 Yes No								
	Yes	No	Did you receive a prior-year tax refund or credit adjustment during 2026? If yes, provide the amount(s) and dates received.								
	Yes	No	Would you like to allow your tax preparer or another person to discuss your return with the IRS? <i>Designee's name Phone number PIN (any five digits)</i>								
CHILDREN & EDUCATION	Yes	No	Were any children born or adopted in 2026? (Provide statement for other expenses.)								
	Yes	No	Did you receive a prior-year Child Tax Credit adjustment? Provide the IRS notice and details.								
	Yes	No	Were any children attending college?	Year in college	Paid by you: Tuition \$		Student loan interest \$		Books \$		
					Paid by student: Tuition \$		Student loan interest \$		Books \$		
	Yes	No	Did you pay any tuition for a private school for a dependent or take classes yourself?								
			Student						Amount paid \$		
			Name and address of school								
	Yes	No	Did you pay for child or dependent care so you could work or go to school? (add statement if needed)								
			Name of provider						EIN or SSN		
			Address						Amount paid \$		
Yes	No	Do you have any children who have unearned income of \$1,350 or more?									
Yes	No	Did you make any contributions to a 529 plan in 2026?									
INVESTMENTS	Yes	No	Did you, or will you, contribute any money to an IRA for 2026?						Traditional IRA		Roth
	Yes	No	Did you roll over any amounts from a retirement account in 2026?								
	Yes	No	Did you sell or transfer any stock or sell rental or investment property?								
	Yes	No	Did you receive any income from an installment sale?								
	Yes	No	Did you have any investments become worthless or were you a victim of investment theft in 2026?								
	Yes	No	Were you granted, or did you exercise, any employee stock options during 2026?								
	Yes	No	Did you receive, sell, send, exchange, or otherwise dispose of any financial interest in any virtual currency?								
DEDUCTIONS	Yes	No	Did you contribute, or plan to contribute, to an HSA for 2026? Provide dates and amounts.								
	Yes	No	Did you pay interest on a boat or RV loan with living quarters? Provide details.								
	Yes	No	Did you pay sales taxes on a major purchase in 2026, such as a vehicle, boat, or home?								
	Yes	No	Did you make any charitable contributions in 2026? If yes, provide details.								
BUSINESS	Yes	No	Did you work from a home office or use your car for business?								
	Yes	No	Did you receive income from a sharing/gig economy activity (e.g. Airbnb, Uber, etc.)?								
	Yes	No	Do you own a business or an interest in a partnership, corporation, LLC, farming activities, or other venture?								
HOME	Yes	No	Did you purchase or sell a main home during the year? If yes, provide closing statement.								
	Yes	No	If you sold a home, did you claim the First-Time Homebuyer Credit when it was purchased? If yes, provide details.								
	Yes	No	Did you refinance a mortgage or take a home equity loan? If yes, provide closing statement.								
	Yes	No	Did you use any mortgage loan proceeds for purposes other than to buy, build, or substantially improve your home?								
	Yes	No	Did you make any new energy-efficient improvements to your home? If yes, provide details.								
State information		Full-year resident		Part-year resident		Nonresident		School district			
States of residence during 2026 and dates								Do you rent or own your home? Rent			
Own											

Income Worksheet

Provide to your preparer all Forms W-2, 1099-INT, 1099-DIV, 1099-R, 1099-MISC, 1099-NEC, and other income reporting statements. Do not list dollar amounts for the following forms. Your preparer will report the appropriate amounts.

Indicate "T" for taxpayer, "S" for spouse, "J" for joint Provide additional statements if more room is needed

Forms W-2—Wage and Tax Statement

T/S	Employer name	T/S	Employer name
	1)		4)
	2)		5)
	3)		6)

Forms 1099-INT—Interest Income

T/S/J	Name of issuer	T/S/J	Name of issuer
	1)		4)
	2)		5)
	3)		6)

Forms 1099-DIV—Dividends and Distributions

T/S/J	Name of issuer	T/S/J	Name of issuer
	1)		4)
	2)		5)
	3)		6)

Forms 1099-R—Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, Etc.

T/S	Name of issuer	T/S	Name of issuer
	1)		4)
	2)		5)
	3)		6)

If the distribution is before age 59½, give a reason to determine if an exception to penalty applies.

Tax-Exempt Interest (such as municipal bonds—include statement)

Payer	\$	Payer	\$
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Other Income

State tax refund	\$	Unreported tips	\$
Unemployment compensation	\$	Other	\$
Social Security (taxpayer)—provide SSA-1099 or RRB-1099	\$		\$
Social Security (spouse)—provide SSA-1099 or RRB-1099	\$		\$
Gambling income—provide W-2G	\$		\$
Business income (see Sole Proprietorship Tax Organizer)		Stock sales	See "Sales and Exchanges Worksheet" below.
Rental income (see Rental Property Tax Organizer)		Sale of other property	

Sales and Exchanges Worksheet

Provide information about sales of stock, real estate, or other property, along with Forms 1099-B, 1099-S, or other supporting statements.

Description of property	Purchase date	Cost/basis	Sale date	Sale price
		\$		\$
		\$		\$
		\$		\$

Notes:

- When stock is sold, you will usually receive Form 1099-B, *Proceeds From Broker and Barter Exchange Transactions*, reporting the proceeds from the sale. However, your statement will not always provide the cost/basis information necessary to compute gain or loss. If the statement does not contain the cost/basis information, you must provide it. You may need to contact your broker for questions about cost/basis and purchase dates of your stock accounts.
- Often, "transfers" of stock or mutual funds within a brokerage account are actually sales of one type of stock and purchase of another. Even if you did not receive any cash from the transaction, you may have taxable gain or loss.
- If your stock dividends are automatically reinvested, the dividends will be taxable even though you did not receive any cash. The transaction is treated as if you had received cash and purchased additional stock. When the stock is sold, the amount reinvested over the years is taken into account. You may need to contact your broker for questions about the amount of reinvested dividends.
- If you sold property other than stock, your taxable gain or loss will be determined by your cost/basis. The cost/basis is usually the original purchase price plus improvements (the cost of repairs and maintenance are not taken into account for cost/basis).

Itemized Deductions Worksheet

2026 base standard deductions: Single/MFS \$16,100; MFJ \$32,200; HOH \$24,150. Special rules apply.

Medical Expenses. Must exceed 7.5% of income to be a benefit—include cost for dependents—do not include any expenses that were reimbursed by insurance.				Charitable Contributions. If over \$500 in noncash charitable contributions, provide details of contributions. Rules require that the taxpayer retain documentation for all contributions.			
Dentists	\$	Hospitals	\$	Cash	\$		
Doctors	\$	Insurance	\$	Noncash contributions (FMV). Clothing or household items must be in good used condition or better.	\$		
Equipment	\$	Prescriptions	\$	Did you transfer funds from an IRA directly to a charity? Yes No	\$		
Eyeglasses	\$	Other	\$	Charitable mileage			
Medical miles: See 2026 mileage sheet				Casualty and Theft Losses			
Taxes Paid. Do not include taxes paid for full or partial business or rental-use property, including business use of the home.				If you suffered any sudden, unexpected damage or loss of property, or a theft in a federally-declared disaster area, provide details to your tax preparer. Yes No			
State withholding			Reported on W-2	Miscellaneous Itemized Deductions. Miscellaneous itemized deductions subject to the 2% AGI limitation are no longer deductible on the federal return. However, these expenses may still be deductible on your state return. For use of home, auto mileage, or other job-related expenses, provide information on a separate sheet. Were any expenses reimbursed by your employer? Yes No			
State estimated taxes—paid in 2026			\$	Dues	\$	Subscriptions	\$
Real estate tax—residence			\$	Investment expenses	\$	Supplies	\$
Real estate tax—other			\$	Job education	\$	Tax prep fees	\$
Personal property taxes			\$	Job seeking	\$	Tools	\$
Property tax refund—received in 2026			\$ ()	Legal fees	\$	Uniforms	\$
Foreign tax paid			\$	Licenses	\$	Union dues	\$
Other			\$	Safety equipment	\$	Other	\$
Other			\$	Other Deductions. The following deductions are not subject to a 2% of income limit.			
Balance paid in 2026 from prior year state returns (do not include interest or penalties)			\$	Gambling losses	\$	Federal estate tax on IRD	\$
Did you keep receipts for sales tax paid during 2026? Yes No				Impairment-related expenses	\$	Other	\$
Did you purchase a car, plane, boat, or home in 2026? Yes No				Did you pay a mortgage insurance premium when you purchased your home? Amount \$ Date			
Sales tax paid \$ Purchase paid \$ Date							
Interest Paid. Do not include interest paid for full or partial business or rental-use property, including business use of the home. Provide all Forms 1098 or lender information and ID numbers.							
Main home	\$	Equity loan	\$				
Second home	\$	Equity loan	\$				
Points	\$	Investment interest	\$				

Other Deductions or Questions

Gambling losses: generally 90% of losses, capped at winnings, for 2026. Keep a complete log.

- Work clothing is not deductible if adaptable for every day wear. Exception for safety equipment, such as steel-toe boots.
- Expenses to enable individuals, who are physically or mentally impaired, to work are generally deductible.

Adjustments Worksheet

Educator expenses: report all qualifying costs. Above-the-line limit \$350; itemizing may allow more.		
HSA contributions: some contributions for 2026 may be made in 2027. Provide dates and tax-year designation.		
Self-employed SEP, SIMPLE and qualified plans: provide 2026 contributions and any intended 2027 payments.		
Self-employed health insurance deduction. Sole proprietors, partners, and 2% S corporation shareholders if not eligible for employer coverage.		\$
Penalty on early withdrawal of savings.		\$
IRA: provide 2026 contributions, including eligible payments made in 2027. Roth IRA contributions are not deductible.		
\$ Student loan interest deduction. Paid for taxpayers and dependents. Income limits apply.		
\$		
Moving expenses: qualifying Armed Forces and intelligence-community moves may be eligible. Provide dates, costs and reimbursements.		
		Ask preparer
Business expenses of reservists, performing artists, and fee-based government officials.		Ask preparer
Cash gifts to eligible charities: non-itemizer limit \$1,000 (\$2,000 MFJ). Eligibility rules apply.		
Other adjustments. Include description.		\$

Estimated Tax Payments — Tax Year 2026

Installment	Date paid	Federal	Date paid	State
First		\$		\$
Second		\$		\$
Third		\$		\$
Fourth		\$		\$
Amount applied from 2025 overpayment?		\$		\$
Total		\$		\$

Prior-year Tax Refunds or Credit Adjustments

Payment date	Amount received	Payment date	Amount received	Payment date	Amount received
Date: _____	\$	Date: _____	\$	Date: _____	\$
Date: _____	\$	Date: _____	\$	Date: _____	\$

Tax Preparation Checklist

- Please provide the following documentation:
- ☐ All Forms W-2 (wages), 1099-INT (interest), 1099-DIV (dividends), 1099-B (proceeds from broker or barter transactions), 1099-R (pensions and IRA distributions), Schedules K-1 from partnerships, S corporations, estates and trusts, and other income reporting statements, including all copies provided from the payer.
 - ☐ Form 1095-A (for health insurance purchased through a public exchange), Form 1095-B (for health insurance purchased outside of a public exchange), or Form 1095-C (for employer-provided health insurance coverage).
 - ☐ If you are a new client, provide copies of last year’s tax returns.
 - ☐ The completed Individual Income Tax Organizer. *Note:* If you choose not to fill out the organizer, you must at least answer the “Yes” or “No” questions under “Questions — All Taxpayers.”
 - ☐ Copy of the closing statement if you bought or sold real estate.
 - ☐ Mileage figures for any automobile expenses claimed, including total mileage, commuting mileage, and business mileage.
 - ☐ Detail of estimated tax payments made, if any.
 - ☐ Income and deductions categorized on a separate sheet for business or rental activities.
 - ☐ List of itemized deductions categorized on a separate sheet for medical, taxes, interest, charitable, and miscellaneous deductions.
 - ☐ Copy of all acknowledgement letters received from charitable organizations for contributions made in 2026.

Taxpayer Responsibilities

- You agree to provide us all income and deductible expense information. If you receive additional information after we begin working on your return, you will contact us immediately to ensure your completed tax returns contain all relevant information.
- You affirm that all expenses or other deduction amounts are accurate and that you have all required supporting written records. In some cases, we will ask to review your documentation.
- You must be able to provide written records of all items included on your return if audited by either the IRS or state tax authority. We can provide guidance concerning what evidence is acceptable.
- You must review the return carefully before signing to make sure the information is correct.
- Fees must be paid before your tax return is delivered to you or filed for you. If you terminate this engagement before completion, you agree to pay a fee for work completed. A retainer is required for preparation of late returns.
- You should keep a copy of your tax return and any related tax documents. You may be assessed a fee if you request a copy in the future.

Signatures. By signing below, you acknowledge that you have read, understand, and accept your obligations and responsibilities. For a joint return, both taxpayers must sign.

Taxpayer	Spouse	Date
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Privacy Policy

The nature of our work requires us to collect certain nonpublic information. We collect financial and personal information from applications, worksheets, reporting statements, and other forms, as well as interviews and conversations with our clients and affiliates. We may also review banking and credit card information about our clients in the performance of receipt of payment. Under our policy, all information we obtain about you will be provided by you or obtained with your permission.

Our firm has procedures and policies in place to protect your confidential information. We restrict access to your confidential information to those within our firm who need to know in order to provide you with services. We will not disclose your personal information to a third party without your permission, except where required by law. We maintain physical, electronic, and procedural safeguards in compliance with federal regulations that protect your personal information from unauthorized access.

AVEK Accounting & Tax

2026 TAX ORGANIZER | Individual

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Before you begin

Use this organizer for tax year 2026, generally filed in 2027.

Download the PDF first. Complete it in a PDF reader or print it and write by hand.

Save and reopen your copy to check your answers. This PDF does not submit them.

Contact AVEK to arrange delivery of your completed organizer and supporting records.

Taxpayer or business name

For a fiscal-year business, enter the beginning and ending dates

Additional 2026 information

Tips or overtime pay: provide occupation and employer statements.

New personal vehicle loan: provide interest statement, VIN and purchase date.

Educator expenses, cash charitable gifts or qualifying moving costs: give details.

Mileage: keep the two halves of 2026 separate

Attach a mileage log for each vehicle. Enter miles, not dollar deductions.

Purpose

Jan. 1 - June 30

July 1 - Dec. 31

Business

Medical / qualifying moving

Charitable

2026 rates: business 72.5 / 76 cents; medical 20.5 / 23.5 cents; charity 14 cents all year.

Qualifying moving expenses use the medical rates. Eligibility and other limits apply.

Updated September 9, 2026 | Keep a copy of the completed organizer for your records.