



2026-2027

Tax Organizer

 Individual Checklist

Tax season is just around the corner.
Now is the perfect time to start planning for it.

New Client Checklist

- ☐ Signed Engagement Letter
- ☐ Tax Preparation fees paid in prior year
- ☐ Copy of Previous Year's Tax Return
- ☐ Copy of SSN(s) and DOB of everyone to be listed on your tax return
- ☐ Copy of Driver's License
- ☐ Voided check for direct deposit (IRS requirement)

Personal Information & Life Changes

- ☐ Current address and/or new mailing address
- ☐ Marital or filing status changes as of 12/31/2026
- ☐ Relocation to or from Indiana (date of move)
- ☐ Changes in dependents during the year
- ☐ List of non-child dependents

Education & College Expenses

- ☐ Tuition statements and education expenses (1098-T & 1099-Q)
- ☐ College or university tax ID
- ☐ Student loan interest statement
- ☐ 529 plan contributions (Indiana accounts)
- ☐ 529 plan distributions for K-12 or college expenses
- ☐ Private school or homeschooling (count of students)

*This is not a comprehensive list. If you have additional documents that need to be included, please submit them. **We cannot prepare your tax return without a signed Engagement Letter.***

Retirement & Investment Income

- ☐ IRA, Roth IRA, and retirement plan contributions or distributions
- ☐ Roth IRA conversion documentation (1099-R and 5498 Forms)
- ☐ Brokerage statements (1099-B Forms and Statements)

Income, Employment & Other

- ☒ All W-2s
- ☐ 1099 forms (1099-INT, DIV, MISC, NEC, K, G, SSA, etc.)
- ☐ Tip income received in 2026 (lesser of W-2 tips or \$25,000)
- ☐ Unemployment compensation (1099-G)
- ☐ Social Security income (1099-SSA Statements)
- ☐ Digital asset transactions (crypto, NFTs, virtual real estate, etc.)
- ☐ Securities that became worthless during the year
- ☐ Gambling winnings and losses (W-2Gs)

Self-Employed, Rental & Business Income

- ☐ Self-employment income and expense summary (Schedule C)
- ☐ Rental income and expenses by property (Schedule E)
- ☐ Farm income and expenses (Schedule F)
- ☐ Statutory employee business expenses
- ☐ Home office expenses (if applicable)
- ☐ K-1s from partnerships, S-corporations, trust or real estate entities

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Health Insurance & Medical

- ☐ Health insurance coverage confirmation for all household members
- ☐ Forms 1095-A (Marketplace policies)
- ☐ Medical expenses (if near 7.5% of AGI)
- ☐ Long-term care insurance paid (Include policy declaration page)

Housing & Real Estate

- ☐ Mortgage interest statements (1098)
- ☐ Real estate tax statements
- ☐ Settlement statements for purchase or refinance (ALTA, 1099-S)
- ☒ Home equity loan interest statements
- ☐ Receipts for home improvements or repairs

Deductions & Credits

- ☐ Charitable contributions (cash and non-cash; receipts required)
- ☐ Donations over \$250 (acknowledgement letters)
- ☐ Moving expenses (military only)

Child & Dependent Care

- ☐ Child care expenses: provider name, address, federal ID and amount paid per child or per provider
- ☐ Confirmation of dependent unearned income (of \$1,100 or more, \$350 for self-employed)

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Identity Protection & IRS Notices

- ☐ IRS IP Pin notice (CP01A), if issued

Taxes Paid

- ☐ Quarterly estimated tax payments (federal and state) with dates
- ☐ Total rent paid in Indiana: Landlord name and address, rental address (if different) and months rented and total amount paid

Energy Credits & Green Improvements

- ☒ Energy-efficient home improvements completed by 12/31/2026 (windows, doors, insulation, solar, geothermal, electric panel upgrades, energy audits)

Vehicles & Transportation

- ☐ Clean energy vehicle purchase documentation (new or used, purchased by 9/30/2026)
- ☒ Car loan interest paid on vehicles purchased in 2026
- ☐ Excise tax paid on license plate registrations

If you have any questions regarding any of these documents or what you should submit, feel free to call our office at (317)-588-3131!

Thank You!

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