



INCOME TAX GUIDE AND ORGANIZER

FOR:

Tax Year 2026

PROVIDED BY:

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This booklet will assist you in collecting the necessary information to prepare your tax return accurately. Given the nature of tax laws this year, please include as much of the requested information as possible. This will help optimize your potential tax savings opportunities.

PERSONAL DATA

Taxpayer (T)			Spouse (S)		
Name (Last, First, Middle Initial)			Name (Last, First, Middle Initial)		
SSN (last 4 digits)	DOB	Occupation	SSN (last 4 digits)	DOB	Occupation
Mailing Address		☐ Check if address is new	Mailing Address		☐ Check if address is new
City, State & Zip		County	City, State & Zip		County
Phone:	HW C	Phone:	HW C	Phone:	HW C
E-Mail Address:			E-Mail Address:		

DEPENDENTS

Name (First, Middle Initial and Last)	D.O.B.	SSN (last 4 digits)	No. of mos. lived in your home during year*	
			X if not living with you	Relationship

- If more lines needed, list two per line. Note last 4 digits of Social Security numbers, unless new this year.
- If married but filing separately, list name of spouse and Social Security number at top of page.
- If filing Head of Household and qualifying person is your child but not your dependent above, enter child's name here: _____

*Place an asterisk by any dependent attending college or post-secondary school.

QUESTIONS: (Please explain "Yes" answers)

- | | | |
|--|------------------------------|-----------------------------|
| 1. Did your name, address or marital status change during the year? | Yes ☐ | No ☐ |
| 2. Can you be claimed as a dependent on another tax return? | Yes ☐ | No ☐ |
| 3. Are you (or your spouse) blind or permanently disabled? | Yes ☐ | No ☐ |
| 4. Did you claim children above that don't live with you? | Yes ☐ | No ☐ |
| 5. Did you carry forward or incur any adoption expenses during the year? | Yes ☐ | No ☐ |

Note: Children's time away from home while attending school counts as time in your home.

INCOME TAXES PAID OR REFUNDED

		Federal	State	Local
Balance paid on last year's return (or prior years)				
Refunds received from last year's return (or prior years)				
Refunds applied to current year				
ESTIMATED TAX DUE DATES		Date Pd.		
If not paid by due dates indicated, list actual dates paid. If state/local tax paid on different dates, attach details.	1 st Qtr.	4/15		
	2 nd Qtr.	6/15		
	3 rd Qtr.	9/15		
	4 th Qtr.	1/15		

If someone else prepared your tax return last year, please provide a copy.

INCOME

WAGES/SALARIES/W-2 FORMS

[illegible]

NEW! QUALIFYING TIP / OVERTIME INCOME

S J	Source of Income	Amount
	Tips: Included in W-2 from above	
	Tips: Not included in W-2 from above	
	Overtime: Included in W-2 from above	

MISCELLANEOUS INCOME (Show losses in brackets)

J	Source of Income	Amount
	Alimony <i>(pre-2019 agreements, if you pay alimony, list on page 9)</i>	
	Jury Duty <i>(or other public service)</i>	
	Contest/Awards/Gambling Winnings <i>(attach 1099-MISC, W-2G or explain)</i>	
	Commissions/Bonuses <i>(not reported on W-2)</i>	
	Pensions/Annuities <i>(furnish 1099-R forms)</i>	
	IRA/Keogh profit sharing distributions <i>(attach Form 1099-R)</i>	
	Unemployment Compensation <i>(attach Form 1099-G)</i>	
	Partnerships/Estates/Trusts <i>(furnish K-1 forms)</i>	*
	Small Business Corporations/Subchapter S <i>(furnish K-1 forms)</i>	*
	Business/Self-Employed <i>(furnish schedule or details)</i>	*
	Farm <i>(furnish schedule or details)</i>	*
	Rental <i>(furnish schedule or details)</i>	*
	Forgiven Debt <i>(attach Form 1099-A or C)</i>	
	Other <i>(explain):</i>	

* ☒ if you did not actively or materially participate in earning the income (or loss) listed

NON-TAXABLE INCOME (Please provide, even if not taxable)

Pre-2019 Child Support/Payments/Assistance (not alimony)		
Veterans Benefits/Disability Income		
Workers' Compensation/Loss-of-Time		
Other (explain):		

Code	SOCIAL SECURITY INCOME		Benefits (from box 5)	Federal tax withheld
T — Taxpayer	IMPORTANT: Provide all SSA-1099 statements	Taxpayer		
S — Spouse J — Joint Use these codes if married filing jointly		Spouse		

SALE OF PERSONAL RESIDENCE			
Date Old Residence Acquired		Cost or Basis	
Improvements <i>(additions, landscaping, driveway, new roof, etc.)</i>			
Fixing-Up Expenses <i>(painting, repairs, etc., to prepare for sale)</i>			
Date Old Residence Sold		Selling Price	
Expenses of Sale <i>(commissions, legal fees, points, stamps, etc.)</i>			
1. Was any part of residence rented during the year?		Yes	No
2. Did you own and use the home as your principal residence for at least 2 of the last 5 years?		Taxpayer: Yes	No
		Spouse: Yes	No
3. Was the sale due to a job transfer, medical issue or unforeseen circumstance?		Yes	No
4. Have you deferred a gain from the sale of a personal residence into the home sold? If so, please provide Form 2119 from tax return for the year that prior home was sold.		Yes	No
5. Was the residence used as a home office?		Yes	No
6. Have you or your spouse sold a principal residence within the last 2 years?		Yes	No
7. Has a spouse died in the past 2 years?		Yes	No
Note: Capital gains tax laws allow exclusion of up to \$500,000 (joint), \$250,000 (single/HH) of home sale gains.			

NEW RESIDENCE		
Date New Residence Acquired <i>(or construction began)</i>		
Date You Occupied New Residence	Cost of New Residence	
If married, do you and your spouse have the same proportionate interest in the new residence as in the old?	Yes	No
Did either you or your spouse have NO ownership interest in a principal residence during the past three years prior to this purchase?	Yes	No
Note: Attach copy of real estate closing papers for both sale and purchase.		

HIGHER EDUCATION EXPENSES			
<i>Many higher education expenses qualify for special tax credits and deductions. Others may qualify as exclusions from income for tax-free and/or penalty-free withdrawals from your tax-deferred savings accounts. Please provide information for each student and include all 1099-Q forms.</i>			
Note: "✓" if student is attending less than 1/2 time	1st Student	2nd Student	3rd Student
Code (T=Taxpayer, S=Spouse, D1=Dependent 1, D2=Dependent 2)			
Attach any 1098-T's received <i>(required)</i>	Amount	Amount	Amount
Tuition			
Fees			
Books and Supplies <i>(purchased from institution)</i>			
Other Education Expenses <i>(attach details)</i>			
Room and Board			
Amount of any grants, scholarships or other tax-free educational funds received			

JOB RELATED EDUCATION*			
<i>Enter amounts only if job/career-related and only for you and your spouse; *potential state deduction</i>			
Room and Board			
Books and Supplies			
Seminar Fees			
Travel <i>(# of Miles)</i>			

DEDUCTIONS

List only amounts that have actually been paid during the year. You may round to the nearest dollar. **DO NOT DUPLICATE ANY ENTRY.**

MEDICAL

Only unreimbursed medical expenses that exceed 7.5% of adjusted gross income are allowed.

T/S	Drugs and Medicines			Amount		
	Prescriptions & Drugs (Doctor Prescribed Only)					
	Insulin					
T/S	Medical Insurance	Please specify if paid:	Pre-Tax ☐	After Tax ☐	Unsure ☐	Amount
	Insurance — Paid by You ☒ if paid through a health insurance exchange ☐					
	Group Health Plans (deducted from salary; provide final year pay stub)					
	Medicare Premiums	From Social Security Benefits				
		From Supplemental Insurance				
	Long-Term Health Care Insurance					
	HSA, Other (Attach 1099-SA for any HSA withdrawals)					
T/S	*Doctors, Dentists, Clinics, Hospitals, Nurses, Etc.	Amount Paid By You	T/S	Other Medical Expenses	Amount Paid By You	
				Eye Glasses/Contact Lenses		
				Hearing Aids & Supplies		
				X-Ray/Lab Fees		
				Ambulance, Paramedics		
				Nurses (Board & Room)		
				Medical Aid Rental		
				Artificial Teeth		
				Equipment (Prescribed)		
				Nursing Home Medical Care		
				Medicare Part B Service Payments		
				Smoking Cessation Program		
				Parking/Transportation Fees		
	*Summary Total (Optional)					
	Lodging: While away from home (per day, per person maximums apply)					
	Transportation: Total number of miles driven for medical reasons or actual cost					
	Above amounts reimbursed by insurance (include Form 1099-LTC)					
	Note any health insurance premium credits received during the year					

Comments or explanations:

NOTE: Use T/S columns above and on page 9 under **OTHER DEDUCTIONS** if married and filing separately or to determine if filing separately could be beneficial. Be sure to include co-payments for doctor visits.

TAXES

Description of Tax	State Located	Amount of Tax
Real Estate Taxes <i>(Include whether you plan to itemize or not)</i>		
Real Estate Taxes - Other <i>(Exclude if included on a rental schedule)</i>		
Property Tax Rebates <i>(If any)</i>		()
Personal Property Tax <i>(If any)</i>		
Auto Licenses <i>(Not a deduction in all states)</i> Number of Licenses		Total Cost
State or Local Income Taxes <i>(if not listed elsewhere or on W-2) (describe below)</i>		
Sales Tax*:		
Other:		
Comments or Explanations:		

* Please provide sales tax support documents for any large purchases made during the year.

INTEREST

Amounts, names, and Social Security numbers must match Form 1098 issued by financial institutions.

Mortgage Interest, Principal Residence	Paid to Financial Institution <i>(include Form 1098)</i>		
	Paid to an Individual <i>(List name, address, Soc. Sec. no. below)</i>		
	Name	Address	Soc. Sec. No.
Mortgage Interest, Second Home	Paid to Financial Institution <i>(include Form 1098)</i>		
	Paid to an Individual <i>(List name, address, Soc. Sec. no. below)</i>		
	Name	Address	Soc. Sec. No.

Did you acquire a new mortgage or borrow on an existing mortgage during the year? <i>(Provide closing settlement papers - pages 1 & 2)</i>	Yes ☐ No ☐
If yes, what is your combined mortgage debt?	\$
Points paid to acquire new mortgage <i>(if not included above)</i>	
Home Improvement Loan Interest <i>(include Form 1098)</i> <i>(only if used to buy, build or substantially improve your qualified home)</i>	
Student Loan Interest <i>(Attach Form 1098-E & loan details: for whom, loan date, loan purpose)</i>	
New Vehicle Loan Interest <i>(for qualified autos assembled in U.S.)</i>	
Other:	
Other:	
Deductible Investment Interest <i>(e.g. margin interest, explain below)</i>	
Comments or Explanations:	
NOTE: Personal interest from credit cards, department stores, used autos, bank loans, etc., is not deductible.	

CONTRIBUTIONS								
Church and Religious								
T/S	Name of Church			If No Receipt	X		Amount	
	Church (Name)							
	Church (Other)							
	Other Religious (Name)							
Other Charitable Organizations (You must have a canceled check, a bank record or receipt from donee for all cash contributions)								
T/S		If No Receipt	X	Amount	T/S	If No Receipt	X	Amount
	Cancer					Heart Fund		
	Easter Seals					Christmas Seals		
	Red Cross					United Way		
	Scouts					YMCA/YWCA		
	Muscular Dystrophy					Educational TV/Radio		
	Arthritis Foundation					Misc. Door-to-Door		
	Veteran's Org. (Name)					Schools (Name & Describe)		
Summary Total Optional (See note below)								
Note: A summary total for cash or check contributions may be used above. Political contributions are not deductible. If you received a gift for your donation listed above, reduce your donation by the value of the gift. Receipt required for all single donations of \$250 or more.								
Noncash Contributions (List the fair market value of noncash items donated, such as clothing and other property)								
T/S	Name of Organization		Items Donated		Date		Value	
Note: If noncash donations have a total value of \$500 or more, attach a detailed list of items donated, the name and address of donee organization, the purchase date, cost and the method used to arrive at fair market value (items over \$5,000 require appraisal). If you donated a vehicle, please attach Form 1098-C received from the charity. If the charity sells the vehicle, your deduction value is generally limited to the amount of the sales proceeds. Donated clothing and household items must be in good or better condition.								
Volunteer Work — Mileage (Church, hospitals or non-profit organizations or to drop off contributions)								
T/S	Name of Organization		Activity Performed		Parking		Miles Driven	
Note: Meals, lodging and other expenses may also be allowed. List full details.								
Comments or explanations:								

IMPORTANT CHANGES IN 2026

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OTHER DEDUCTIONS

T/S		Amount	T/S		Amount
	Casualty/Theft Losses				
	From fire, storm, theft, and auto damage — if more than one, provide similar detail for each				
	Kind of Property or Item	Date Acquired	Cost or Basis		
			Insurance Paid		
	Describe how and/or what happened	Date of Loss	Fair Market Value – Before		
			Fair Market Value – After		
	Alimony Paid (<i>note if pre-2019</i>)	Paid to: (Name)	SSN		
	Gambling Losses	(Limited to gambling winnings)			

Note: See next page (10) for auto business expenses.

CHILD AND DEPENDENT CARE ☒ if you have employer-provided

☒ if you have employer-provided dependent care benefits. ☐

- ☒
- if required to be gainfully employed (or a full-time student), or if service performed in your home (nanny) _____

Name of Provider	Soc. Sec. or ID Number	Address	Paid	
Federal ID number if required to file IRS wage reports	#	Total Child Care Paid During Year	\$	
		No. of Children Under Age 13	#	

Form W-10 should be used to obtain provider details. Expenses must be allocated by child or dependent. If more space needed, attach list with details.

RETIREMENT CONTRIBUTIONS

	Date	Traditional IRA	Roth IRA	Keogh/SEP/SIMPLE
Single or Taxpayer	/ /			
Spouse	/ /			
If you want the maximum allowable deduction - write MAX in column(s). You will be informed of amount to deposit.				
List total value of ALL IRAs on 12/31	Single or Taxpayer			Spouse

BUSINESS EXPENSES

How to use: Report your sole proprietor business expenses. Please limit information to one business. Use additional pages if necessary, one business per page.

Type of Business		Business Owner:	Taxpayer ☐	Spouse ☐
Total Revenue			Both ☐	

BUSINESS EXPENSES (if more lines needed, continue on back page)

Advertising		Insurance		Repairs/Maint.	
Commission/Fees		Interest		Taxes/Licenses	
Contract Labor		Legal/Prof. Services		Utilities	
Depreciation		Office Supplies		Wages	
EE Benefits		Rent or Lease		Other:	
Total Business Expenses				\$	
Meal Expense				\$	
Did you purchase any business equipment during the year? (If yes, attach details)					Yes ☐ No ☐

VEHICLE EXPENSE

	Date Placed in Service	Make	Year	Model	Cost or Basis	☒ if New This Year
Vehicle 1	/ /					Furnish details on newly acquired vehicles and trade-in or disposition of old vehicle.
Vehicle 2	/ /					

Vehicle Mileage Detail

	Vehicle 1	Vehicle 2
☐ X if another vehicle is available for personal use.		
A. End of Year	+	
B. Beginning of Year	-	
1. Total Miles Driven	=	
2a. Business Miles, Jan-June		
2b. Business Miles, July-Dec.		
2c. Business Miles, 2a+2b	-	
3. Personal Miles	=	
% Business Use (Line 2c ÷ Line 1)	=	
No. round-trip miles from home to work		
Number of days worked last year		

	Vehicle 1	Vehicle 2
Gas & Oil		
Insurance		
Lease Payments		
		Licenses
		Repair/Maint/Lube
		Other:

TRAVEL EXPENSES — AWAY FROM HOME (Days gone overnight)

Transportation		Auto Rental	
Lodging		Cabs, Bus, etc.	

I have adequate records and sufficient written evidence to support use of vehicles and deductions listed above.

(Signature) _____

HOME OFFICE

Type of Business	
Justified business use for:	Taxpayer ☐ Spouse ☐ Both ☐
Date Acquired Home	Utilities
Cost of Land	Interest (mortgage, home equity loan)
Cost of Home	Taxes
Cost of Improvements	Insurance
Sq. Footage of Living Area ⁽¹⁾	Maintenance
Sq. Footage of Office Area ⁽²⁾ (incl inventory & sample storage)	Daycare Provider # of Hours
% Office Area [(2) ÷ (1)]	Other:

QUESTIONS (Taxpayer or Spouse)

For "Yes" answers, supply details on the next page or on a separate sheet:

1. Were you notified by the IRS or YOUR STATE of any change to a tax return?	Yes	☐	No	☐
2. Are any of your claimed dependents not residents or citizens of the U.S.?	Yes	☐	No	☐
3. Did you make any gifts of over \$19,000 to any individual <i>(with no tax advantage to you)?</i>	Yes	☐	No	☐
4. Do you have any foreign income or foreign bank accounts?	Yes	☐	No	☐
5. Did you have living expenses in a foreign country as a result of income earned abroad?	Yes	☐	No	☐
6. Do you have any worthless stocks, uncollectible bad debts or were the victim of a ponzi scheme?	Yes	☐	No	☐
7. Did you become disabled during the year?	Yes	☐	No	☐
8. Are you a handicapped employee?	Yes	☐	No	☐
9. Did you receive any distribution from an IRA, profit sharing or pension plan?	Yes	☐	No	☐
10. Have you used bartering to exchange any goods or services?	Yes	☐	No	☐
11. As a member of the armed forces on active duty, did you move pursuant to a military order?	Yes	☐	No	☐
12. Did you receive reimbursement from a prior year casualty, theft loss or medical deduction?	Yes	☐	No	☐
13. Did you start a new business during the year or do you expect to start one this coming year?	Yes	☐	No	☐
14. Do you expect changes in income, withholding taxes or your tax liability for the coming year?	Yes	☐	No	☐
15. Did you receive any source of income that is not listed in this booklet <i>(lottery, awards, etc.)?</i>	Yes	☐	No	☐
16. Do you have children under age 18 with investment income <i>(age 24 if dependent student)?</i>	Yes	☐	No	☐
17. Did you pay anyone (over 18) \$3,000 or more to work at your home (housecleaning, yard work or other domestic help) during the calendar year? If yes, submit details.	Yes	☐	No	☐
18. Do you wish to designate \$3.00 of your taxes to the Presidential Campaign Fund?	You:	Yes	☐	No
	Spouse:	Yes	☐	No
19. Did you donate a partial interest in any goods to charitable organizations?	Yes	☐	No	☐
20. Do you have a medical or health savings account <i>(MSA or HSA)?</i>	Yes	☐	No	☐
21. If you are age 73 or older, have you started your mandatory retirement savings withdrawals?	Yes	☐	No	☐
22. Did you receive employer-provided:	commuter transportation benefits?	Yes	☐	No
	educational assistance?	Yes	☐	No
23. Did you pay long-term healthcare insurance premiums or receive benefits?	Yes	☐	No	☐
24. Are you paying off a student loan?	Yes	☐	No	☐
25. Are you a school teacher who paid for classroom materials without reimbursement? <i>(Please provide a recap of expenses for potential deduction.)</i>	Yes	☐	No	☐
26. Have you or your dependents taken a distribution from a qualified tuition program <i>(QTP)</i> or 529 program during the year?	Yes	☐	No	☐
27. Did you roll funds into a Roth IRA during the year?	Yes	☐	No	☐
28. Did you purchase any energy-efficient equipment during the year <i>(air conditioner, furnace, windows, doors, water heater, etc.)?</i>	Yes	☐	No	☐
29. Did you purchase a clean or electric vehicle prior to October 1st?	Yes	☐	No	☐
30. Did you have qualified military combat pay?	Yes	☐	No	☐
31. Did you receive a Form 1099-K?	Yes	☐	No	☐
32. If over age 70 1/2, did you make a direct contribution to a charity from an IRA?	Yes	☐	No	☐
33. Did you receive any premium health insurance credits during the year?	Yes	☐	No	☐
34. Did you receive, sell, exchange, or otherwise dispose of any financial interest in any virtual currency during the year?	Yes	☐	No	☐
35. Did you refinance a mortgage?	Yes	☐	No	☐
36. Did you adopt a child(ren)?	Yes	☐	No	☐
37. Did you receive tip or overtime income?	Yes	☐	No	☐

Please answer all questions above. Provide details for any "Yes" answers. A "No" answer will be assumed if not otherwise indicated.

[illegible]

Other Questions or Comments:

DIRECT DEPOSIT

Please complete the section below and attach a voided check or deposit ticket if you would like your refund directly deposited into your bank account. You may split your refund in up to three accounts. If more than one is requested, please provide your desired deposit allocation and information for each account.

☐ Yes, please split my refund deposit into _____ accounts (3 max.) The allocation % is ____/____/____

Account Type: C: Checking S: Savings

☐ Bank Name: _____ Name on Acct: _____
☐ Routing #: _____ Account #: _____

CHECKLIST AND CERTIFICATION

- ☐ Review amounts and details listed in this tax booklet to ensure completeness and accuracy.
- ☐ Enclose all copies of W-2 and W-2G forms. Include a copy of all 1099 and 1098 forms as requested.
- ☐ Enclose health insurance coverage confirmation (*Form 1095 or equivalent*).
- ☐ Submit other supporting documents (*e.g. Form 1098 and state / county property tax statement(s)*) that may be requested or may be necessary to help justify or clarify a deduction, transaction or sale.
- ☐ Include any IRS-provided one-time use PIN information for tax identification fraud protection.
- ☐ If you paid estimated taxes, enclose estimated forms.
- ☐ If submitting tax data for the first time, include a copy of your previous tax return.
- ☐ If extensions have been filed, please include a copy of extension forms.

I have reviewed the information contained in this booklet and to the best of my knowledge certify it is true, correct, and complete.

(Signature) _____

WHEN COMPLETE, EITHER MAIL, DROP OFF OR CALL FOR AN APPOINTMENT.