

# *2026 Personal Tax*

## BASIC CHECKLIST

- Personal Information
- Dependent Information
- W-2(s), 1099(s), K-1(s)
- Home Ownership Expenses
- Charitable Donations
- Childcare Expense Documentation
- Educational Expenses (Form 1098-T)
- Student Loan Interest (1098-E)
- K-12 Educator Expenses
- Retirement Contributions

## NOTES

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