5280 TAX & ADVISORY

2026 Individual Tax Organizer

Gather information before your individual tax appointment.

Personal & Filing

[ ] Legal names, addresses, phone/email

[ ] SSNs/ITINs for taxpayer, spouse and dependents

[ ] Filing-status changes

[ ] Dependent information

[ ] Prior-year federal/state returns

[ ] Direct-deposit/payment information

Income

[ ] W-2s

[ ] 1099-NEC, 1099-MISC, 1099-K and other 1099s

[ ] 1099-INT, 1099-DIV and brokerage statements

[ ] 1099-R and retirement income

[ ] SSA-1099 and 1099-G

[ ] Business/self-employment records

[ ] Rental income records

[ ] Digital asset activity

[ ] Foreign income/assets if applicable

Deductions & Credits

[ ] Mortgage interest and property tax

[ ] Charitable contributions

[ ] Child/dependent care

[ ] Education forms

[ ] Retirement contributions

[ ] HSA records

[ ] Eligible energy-related documentation

[ ] Business-use-of-home and vehicle records where applicable

Life Events

[ ] Home purchase/sale

[ ] Investment or business sale

[ ] Marriage/divorce

[ ] New business or entity change

[ ] Inheritance/gift

[ ] Casualty/disaster

[ ] IRS/state notices

Client Notes

List unusual transactions or questions rather than omitting them because you are unsure whether they matter.

Important Notice

Educational use only. This material is not individualized tax, legal, accounting, or financial advice and does not create an engagement. Tax rules, forms, deadlines, and state/local requirements can change. Verify current requirements before filing or making decisions.

Primary References

IRS Forms, Instructions & Publications