

Returning client update sheet (sent with the cover letter)

2026 tax year: what changed since last year

Prepared for the clients of (firm name)

Your name, and your spouse's if filing jointly

Compare this year with last year and circle yes or no. A no means nothing changed on that point.

For each yes, upload the papers named under it with your year-end forms.

If every answer is no, upload this year's forms and return this sheet: you can skip the full organizer.

Changes at home since last year

Based on: Form 13614-C, household questions

Has your address changed since we filed last year? ☐ Yes ☐ No

If yes, send: New address and the date you moved

Has your marital status changed? ☐ Yes ☐ No

If yes, send: Marriage certificate or divorce decree

Has anyone joined or left the household you support? ☐ Yes ☐ No

If yes, send: Social Security card and date of birth for each new person

Did you buy, sell or refinance a home? ☐ Yes ☐ No

If yes, send: Closing statement; New Form 1098 from the lender

Changes in work and income

Based on: Forms W-2, 1099 and K-1

Did you change employers or add a second job? ☐ Yes ☐ No

If yes, send: Form W-2 from each employer this year

Did you start, stop or sell a business or side job? ☐ Yes ☐ No

If yes, send: Forms 1099-NEC and 1099-K; Income and expense records

Did you receive a Schedule K-1 you did not get last year? ☐ Yes ☐ No

If yes, send: Each new Schedule K-1

Did you open or close a brokerage, bank or retirement account? ☐ Yes ☐ No

If yes, send: Year-end forms from each new account; Closing statement for each closed account

Did you start drawing Social Security or a pension? ☐ Yes ☐ No

If yes, send: Form SSA-1099; Form 1099-R

New for 2026

Based on: IRS fact sheet on the 2025 law; Publication 526

Were any of your wages tips or overtime pay?

☐ Yes ☐ No

If yes, send: Form W-2 or employer statement showing those amounts

Did you take out a loan this year for a new car for personal use?

☐ Yes ☐ No

If yes, send: Loan interest statement and the car's VIN

Did you give cash to a charity, even without itemizing?

☐ Yes ☐ No

If yes, send: Donation receipts

The IRS and payments

Based on: IP PIN rules; Form 1040-ES

Do you have an Identity Protection PIN for this year?

☐ Yes ☐ No

If yes, send: This year's six-digit IP PIN

Did you receive any letter from the IRS or your state since last year?

☐ Yes ☐ No

If yes, send: A copy of each letter

Did you pay estimated tax for 2026?

☐ Yes ☐ No

If yes, send: Dates and amounts paid

Do you want your refund in a different bank account than last year?

☐ Yes ☐ No

If yes, send: Voided check or bank letter for the new account

Anything else your preparer should know