

Client Tax Organizer

2026 tax year (the return you file in 2027)

Prepared for the clients of (firm name)

Your name, and your spouse's if filing jointly

Answer each question for 2026. Where a question names a document, send that document with this organizer. A yes tells your preparer what to expect; a no saves you both a follow-up.

The last three sections are optional schedules: fill one in only if you were self-employed, drove or delivered for an app, or rented out property.

About you and your spouse

Based on: IRS Form 13614-C (Rev. 10-2026), page 1; IRS, Get an Identity Protection PIN; IRS, About Form 1099-DA

Full name, date of birth, and job title for you and your spouse

Mailing address, phone number, and email address

Did you live in two or more states in 2026? If yes, note the dates you moved.

☐ Yes ☐ No

Can anyone else claim you or your spouse on their tax return?

☐ Yes ☐ No

In 2026, were you or your spouse a U.S. citizen, in the U.S. on a visa, a full-time student, legally blind, or totally and permanently disabled?

☐ Yes ☐ No

If yes, send: Picture ID for you and your spouse

Did the IRS issue you, your spouse, or a dependent an Identity Protection PIN (IP PIN)?

☐ Yes ☐ No

If yes, send: The current-year IP PIN (the IRS issues a new one each year)

Did you or your spouse own, sell, or receive digital assets in 2026?

☐ Yes ☐ No

If yes, send: Form 1099-DA if a broker issued one, and your own record of each sale

How you want a refund paid: direct deposit, split between accounts, or a paper check

Send: Bank routing and account number (a voided check works)

If you owe: pay from a bank account, or another way (say which)

Send: Bank routing and account number, if you pay from a bank account

Would you like letters from the IRS in a language other than English?

☐ Yes ☐ No

Marital status and household

Based on: IRS Form 13614-C (Rev. 10-2026), page 1

Your marital status on December 31, 2026: never married, married, divorced, legally separated, or widowed

If married, did you and your spouse live apart for the last six months of 2026?

☐ Yes ☐ No

If divorced, separated, or widowed: the date of the decree, or the year your spouse died

Everyone who lived with you in 2026 (other than your spouse), and anyone you supported who did not

Send: Social Security cards or ITIN letters for everyone on the return

For each person: date of birth, relationship to you, and months lived in your home

Were any of them a full-time student, totally and permanently disabled, or issued an IP PIN?

☐ Yes ☐ No

If yes, send: The current-year IP PIN for each dependent who has one

Dependents and credits

Based on: IRS Form 13614-C (Rev. 10-2026), pages 1 and 3; IRS, About Form 2441; About Form 8863; About Schedule 8812

Did you pay for child or dependent care in 2026?

☐ Yes ☐ No

If yes, send: A receipt or statement from each provider showing its name, address, TIN or EIN, and the amount you paid

Did you, your spouse, or a dependent take college or other educational classes?

☐ Yes ☐ No

If yes, send: Form 1098-T from each school

Did you pay interest on a student loan?

☐ Yes ☐ No

If yes, send: Form 1098-E from each lender

Has the IRS ever disallowed your Earned Income Credit, Child Tax Credit, American Opportunity Credit, or head of household status?

☐ Yes ☐ No

If yes, send: The IRS letter you received

Income

Based on: IRS Form 13614-C (Rev. 10-2026), page 2; IRS FS-2026-05, What you will need to file your taxes under Working Families Tax Cuts (March 2026); 2026 Form W-2; IRS, About Form 4137; IRS, About Schedule E (Schedule K-1 income)

Did you work as an employee in 2026? ☐ Yes ☐ No

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

Did you earn overtime pay? ☐ Yes ☐ No

If yes, send: Pay stubs or a year-end payroll summary showing overtime, from each employer

Did you receive tips? ☐ Yes ☐ No

If yes, send: The Form W-2, 1099-NEC, 1099-MISC, or 1099-K that shows them, plus your daily or weekly tip log

Did you get any tips you did not report to your employer? ☐ Yes ☐ No

If yes, send: Your tip log (your preparer uses it for Form 4137)

Did you receive retirement, pension, or annuity payments, or take money out of an IRA? ☐ Yes ☐ No

If yes, send: Form 1099-R from each payer

Did you receive disability benefits? ☐ Yes ☐ No

If yes, send: Form 1099-R or Form W-2 for the benefits

Did you receive Social Security or Railroad Retirement benefits? ☐ Yes ☐ No

If yes, send: Form SSA-1099 or Form RRB-1099

Did you receive unemployment benefits? ☐ Yes ☐ No

If yes, send: Form 1099-G for unemployment

Did you get a state or local tax refund in 2026? ☐ Yes ☐ No

If yes, send: Form 1099-G for the refund, plus last year's return (it shows whether you itemized)

Did you earn interest or dividends? ☐ Yes ☐ No

If yes, send: Form 1099-INT and Form 1099-DIV from each bank or broker

Did you sell stocks, bonds, funds, or other investments? ☐ Yes ☐ No

If yes, send: Form 1099-B and the year-end brokerage statement

Did you report a capital loss on last year's return? ☐ Yes ☐ No

If yes, send: Last year's return (it shows the carryover)

Did you receive alimony? ☐ Yes ☐ No

If yes, send: Your divorce decree or separation agreement

Did you rent out a home, a room, or personal property such as a vehicle? If yes, fill in the rental property schedule. ☐ Yes ☐ No

Did you have gambling winnings, including lottery or raffle prizes? ☐ Yes ☐ No

If yes, send: Form W-2G from each payer

Were you paid for contract, freelance, or self-employment work? If yes, fill in the self-employed schedule. ☐ Yes ☐ No

If yes, send: Form 1099-NEC from each client

Did you earn money driving for a rideshare app or delivering food or groceries? If yes, fill in the rideshare and delivery schedule. ☐ Yes ☐ No

If yes, send: Form 1099-K or 1099-NEC from each app

Did you receive a Schedule K-1 from a partnership, S corporation, trust, or estate? ☐ Yes ☐ No

If yes, send: Schedule K-1 from each one

Did you receive any other money in 2026, such as cash payments, jury duty pay, awards, royalties, or strike benefits? ☐ Yes ☐ No

If yes, send: Form 1099-MISC if one was issued, or your own record of what you received

Deductions, adjustments, and life events

Based on: IRS Form 13614-C (Rev. 10-2026), page 3; IRS FS-2026-05 (age 65 and the new deductions); Form 1098-VLI (12-2026); the baby or adoption and home purchase questions are common preparer additions

Did you pay mortgage interest on your home? ☐ Yes ☐ No

If yes, send: Form 1098 from each lender

Did you pay real estate taxes, or state or local taxes outside your paycheck? ☐ Yes ☐ No

If yes, send: Property tax bills, and records of any state or local tax you paid directly

Did you pay medical or dental bills that insurance did not cover? ☐ Yes ☐ No

If yes, send: Receipts or statements from each provider and pharmacy

Did you give money or goods to charity? ☐ Yes ☐ No

If yes, send: Receipts or acknowledgment letters from each charity

Did you put money into an IRA, 401(k), or other retirement account? ☐ Yes ☐ No

If yes, send: Form 5498 or your contribution records

Are you a teacher or other educator who paid for classroom supplies? ☐ Yes ☐ No

If yes, send: Receipts for the supplies

Did you pay alimony? If yes, note the recipient's Social Security number. ☐ Yes ☐ No

If yes, send: Your divorce decree or separation agreement

Did you have a health savings account (HSA)? ☐ Yes ☐ No

If yes, send: Form 5498-SA and Form 1099-SA

Did you buy a new car, SUV, van, pickup, or motorcycle for personal use with a loan? ☐ Yes ☐ No

If yes, send: Form 1098-VLI or the lender's statement of interest paid, plus the purchase contract showing the VIN

Were you or your spouse 65 or older at the end of 2026? Your date of birth covers it; there is nothing extra to send. ☐ Yes ☐ No

Did you have a baby or adopt a child in 2026? ☐ Yes ☐ No

If yes, send: The child's Social Security card, and adoption records if you adopted

Did you sell a home? ☐ Yes ☐ No

If yes, send: Form 1099-S and the closing statement for the sale

Did you buy a home? ☐ Yes ☐ No

If yes, send: The closing statement for the purchase, and Form 1098

Did you have health insurance through the Marketplace (HealthCare.gov or a state exchange)?

☐ Yes ☐ No

If yes, send: Form 1095-A

Was any of your debt cancelled or forgiven?

☐ Yes ☐ No

If yes, send: Form 1099-C (or Form 1099-A for a foreclosure)

Did you have a loss in a federally declared disaster area?

☐ Yes ☐ No

If yes, send: Form 1099-A if issued, plus insurance claim and repair records

Did you receive a letter or bill from the IRS?

☐ Yes ☐ No

If yes, send: The IRS letter or bill

Did you make estimated tax payments, or apply last year's refund to 2026? If yes, note the date and amount of each.

☐ Yes ☐ No

If yes, send: Payment confirmations or bank records for each payment

Is this your first year with this preparer?

☐ Yes ☐ No

If yes, send: Last year's federal and state tax returns

Self-employed and small business (Schedule C) (fill in only if it applies)

Based on: IRS, About Schedule C; About Schedule SE; About Form 8829; About Form 4562; Publication 463. For sole proprietors and single-member LLCs; partnerships, S corporations, and C corporations need their own organizer.

Business name, EIN if you have one, and what the business does

Did you start, stop, or change the business in 2026? If yes, note the date.

☐ Yes ☐ No

Did clients or payment apps send you a Form 1099?

☐ Yes ☐ No

If yes, send: Form 1099-NEC, 1099-MISC, or 1099-K from each payer

Your total business income for 2026, including payments that came with no form

Send: Your own income record (invoices or a sales log)

Your business expenses by category: advertising, car and truck, contract labor, insurance, legal and professional fees, office, rent, repairs, supplies, taxes and licenses, travel, meals, utilities, other

Send: Business bank and credit card statements, or a profit and loss statement

Did you use part of your home for the business? If yes, note the square footage of the office and of the whole home.

☐ Yes ☐ No

If yes, send: Rent or mortgage interest statements and utility bills for the home

Did you buy equipment, furniture, or a vehicle for the business? If yes, note the business-use share of each.

☐ Yes ☐ No

If yes, send: Purchase receipts or invoices for each item

Did you drive your own vehicle for the business?

☐ Yes ☐ No

If yes, send: A written mileage log: dates, business miles, and total miles for the year

Did you make estimated tax payments for the business? If yes, note the date and amount of each.

☐ Yes ☐ No

If yes, send: Payment confirmations or bank records for each payment

Rideshare and delivery drivers (rideshare tax organizer) (fill in only if it applies)

Based on: IRS Gig Economy Tax Center; IRS Tax Tip 2026-26, Filing tips and updates for gig economy workers (March 31, 2026); IRS, Standard mileage rates; Publication 463

The apps you drove or delivered for in 2026

Send: Form 1099-K or 1099-NEC from each app you drove for

Did any app not send you a Form 1099?

☐ Yes ☐ No

If yes, send: The year-end earnings summary from that app (all income counts, with or without a form)

Your miles for 2026: business miles, total miles, and the dates

Send: Your mileage log, or the trip records from each app

The vehicle you used: the date you started using it for this work, and whether you own or lease it

Did you pay for gas, repairs, insurance, or loan interest on that vehicle?

☐ Yes ☐ No

If yes, send: Vehicle receipts and lender statements

Did you pay for a phone, tolls, parking, car washes, or supplies for the work?

☐ Yes ☐ No

If yes, send: Receipts or statements for those costs

Did you receive tips through the app?

☐ Yes ☐ No

If yes, send: The app's tip record or year-end summary showing tips

Did you buy a vehicle or equipment for this work in 2026?

☐ Yes ☐ No

If yes, send: Purchase documents showing the date and cost

Did you make estimated tax payments for this work? If yes, note the date and amount of each.

☐ Yes ☐ No

If yes, send: Payment confirmations or bank records for each payment

Rental property (Schedule E) (fill in only if it applies)

Based on: IRS Form 13614-C (Rev. 10-2026), page 2; IRS, About Schedule E; Publication 527, Residential Rental Property

For each property: address, type (house, condo, room, vacation home), and the date you acquired it

For each property: days rented at a fair price, and days you or your family used it

Did you rent out your own home for fewer than 15 days in 2026?

☐ Yes ☐ No

Rent you received for each property

Send: Your rent ledger, and Form 1099-MISC or 1099-K if one was issued

Did you pay mortgage interest on the property?

☐ Yes ☐ No

If yes, send: Form 1098 for the rental, from each lender

Did you pay property taxes on it?

☐ Yes ☐ No

If yes, send: The property tax bill for the rental

Your other expenses for each property: advertising, auto and travel, cleaning and maintenance, commissions, insurance, legal and professional fees, management fees, other interest, repairs, supplies, utilities, other

Send: Receipts, invoices, or bank and credit card statements

Did you make improvements, or buy appliances or furniture for the property, in 2026?

☐ Yes ☐ No

If yes, send: Invoices for each improvement or purchase

Did you sell the property in 2026?

☐ Yes ☐ No

If yes, send: Form 1099-S and the closing statement for the property

Anything else your preparer should know