Tax organizer template

United States edition

Ask the client to answer every question yes or no, and to add a line of detail for each yes. The note under each question is for you: it says what a yes means for the return.

YOU AND YOUR HOUSEHOLD

- [ ] Did you marry, divorce or legally separate during the year?
  A yes changes the filing status. Ask for the date and, for a divorce, the decree.
- [ ] Was a child born to or adopted by your household?
  A yes brings in the child's Social Security number, and a child born from 2025 to 2028 may qualify for the Trump account pilot contribution on Form 4547.
- [ ] Did anyone join or leave your household, or did you support someone who lives elsewhere?
  A yes means working through dependency and head of household status, with their details and what you paid toward their support.
- [ ] Is any dependent a full-time student?
- [ ] Did anyone on the return receive an Identity Protection PIN from the IRS?
  A yes means asking for the current year's six-digit PIN.
- [ ] Did you move to a different state?
  A yes means part-year state returns. Ask for the dates of the move.

WORK AND INCOME

- [ ] Did you change jobs, or work for more than one employer?
  A yes means a W-2 from each.
- [ ] Did you receive tips or overtime pay?
  A yes means pay records. Qualified tips and overtime can be deducted, within limits, for 2025 through 2028.
- [ ] Did you do any contract, freelance or gig work, including through an app?
  A yes brings in 1099-NEC or 1099-K forms and the client's own records, because many payments arrive with no form at all.
- [ ] Did you receive unemployment compensation?
  A yes brings in Form 1099-G.
- [ ] Did you start receiving Social Security or a pension, or retire?
  A yes brings in the SSA-1099 and any Form 1099-R.
- [ ] Did you take money out of an IRA, 401(k) or other retirement plan?
  A yes brings in Form 1099-R and a question about any rollover.

HOME AND PROPERTY

- [ ] Did you buy, sell or refinance a home?
  A yes brings in the closing statement, and for a sale Form 1099-S and the dates you owned and lived in the home.
- [ ] Did you rent out any property, even for part of the year?
  A yes brings in rent received, expenses, and days of personal use for each property.
- [ ] Do you use part of your home regularly for a business?
- [ ] Did you make improvements to a property you own?

INVESTMENTS AND DIGITAL ASSETS

- [ ] Did you sell stocks, bonds, funds or other investments?
  A yes brings in every Form 1099-B and the cost of anything the broker did not report.
- [ ] Did you receive, sell, exchange or otherwise dispose of any digital asset?
  Form 1040 asks this question directly and the answer is on the return. A yes brings in Form 1099-DA and the client's own transaction records.
- [ ] Did you receive a Schedule K-1 from a partnership, S corporation, estate or trust?
  A yes means waiting for each K-1. A partnership can extend its return by six months, so K-1s often arrive late.
- [ ] Did you inherit money, property or investments?
  A yes means asking for the date of death and values at that date.

FOREIGN ACCOUNTS AND INCOME

- [ ] Did your foreign financial accounts total more than $10,000 at any time in the year?
  A yes means an FBAR, FinCEN Form 114, filed electronically with FinCEN rather than with the return. Ask for each account's highest balance.
- [ ] Did you hold foreign assets such as accounts, shares or interests in foreign entities?
  For a single filer living in the US, over $50,000 at year end or $75,000 at any time brings in Form 8938; double those figures for a joint return.
- [ ] Did you earn income or pay tax in another country?
- [ ] Did you live or work outside the US for any part of the year?

BUSINESS AND SELF-EMPLOYMENT

- [ ] Did you start, buy or close a business?
  A yes brings in formation or closing documents and the first or last year's records.

- [ ] Did you pay any contractor $2,000 or more in the year?
  For payments made in 2026, a yes means a Form 1099-NEC was due to that contractor by January 31.
- [ ] Did you buy a vehicle or equipment used in the business?
- [ ] Did you pay your own health insurance as a self-employed person?

HEALTH, EDUCATION AND CARE

- [ ] Did anyone have coverage through the Health Insurance Marketplace?
  A yes brings in Form 1095-A, needed for Form 8962 to reconcile the premium tax credit.
- [ ] Did you or an employer put money into, or take money out of, a health savings account?
  A yes means Form 8889, even if only an employer contributed, and Forms 5498-SA and 1099-SA.
- [ ] Did you pay tuition or other college costs for anyone on the return?
  A yes brings in Form 1098-T for each student.
- [ ] Did you pay interest on a student loan?
  A yes brings in Form 1098-E.
- [ ] Did you pay for child or dependent care so you could work?
  A yes means the provider's name, address and taxpayer ID. Form W-10 is the IRS form for asking for them.

GIVING AND LARGE PURCHASES

- [ ] Did you give $250 or more to a charity in any single gift?
  A yes means the charity's written acknowledgment, which has to be in hand by the date the return is filed.
- [ ] Did you donate goods, vehicles or property?
  A yes means a description and value; larger gifts need Form 8283.
- [ ] Did you buy a new vehicle for personal use with a loan?
  If it was assembled in the US, the interest may be deductible for 2025 through 2028. A yes brings in the loan statement and the VIN.
- [ ] Did you install solar, a heat pump or other energy property in 2025 or earlier?
  These credits ended for property placed in service after 2025. A yes matters only if an unused residential clean energy credit is still carrying forward.

PAYMENTS, NOTICES AND NEXT YEAR

- [ ] Did you make federal or state estimated tax payments?
  A yes brings in the dates and amounts. The IRS online account shows the federal payments.
- [ ] Did you receive a letter from the IRS or your state?

- [ ] Do you want a refund deposited, or a balance paid, from a new bank account?
- [ ] Do you expect your income or household to change next year?
  A yes is a conversation about withholding or estimated payments before the first one is due on April 15.

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