INCOME TAX ORGANIZER 2026

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SECTION 1 — PERSONAL INFORMATION

Taxpayer

Full Legal Name | Date of Birth | SSN (last 4) | Occupation

Enrolled full-time in postsecondary education? [ ] Yes [ ] No | If yes, attach Form 1098-T for Education Credit

Spouse

Full Legal Name | Date of Birth | SSN (last 4) | Occupation

Enrolled full-time in postsecondary education? [ ] Yes [ ] No | If yes, attach Form 1098-T for Education Credit

Address

Street Address | City | State | ZIP

Address Changed from Last Year? [ ] Yes [ ] No | Cell Phone | Work Phone | Best Email

Filing Status: [ ] Single [ ] Married Filing Jointly [ ] Married Filing Separately [ ] Head of Household [ ] Qualifying Widow(er)

New Client? [ ] Yes [ ] No | Prior Year Preparer (if new) | Prior Year Return Attached? [ ] Yes [ ] No

SECTION 2 — DEPENDENTS

#	Full Legal Name	SSN (last 4)	Date of Birth	Relationship	Months in Home	Full-Time Student?
1						[ ] Yes [ ] No
2						[ ] Yes [ ] No
3						[ ] Yes [ ] No
4						[ ] Yes [ ] No
5						[ ] Yes [ ] No

** Full SSNs are collected securely via the portal intake form at portal.jktaxut.com*

SECTION 3 — INCOME (attach all W-2s, 1099s, K-1s)

Taxpayer W-2 Income

Employer Name | Wages Box 1 $ | Federal W/H Box 2 $ | State W/H Box 17 $ | State

Spouse W-2 Income

Employer Name | Wages Box 1 $ | Federal W/H Box 2 $ | State W/H Box 17 $ | State

Other Income

Ministerial/Clergy Income $ | Housing Allowance $ | Misc Income (1099-MISC) $ | Alimony Received $

Social Security — Taxpayer $ | Social Security — Spouse $ | Pension — Taxpayer $ | Pension — Spouse $

Pass-Through K-1 Income? [ ] Yes [ ] No (attach all K-1s) | State Tax Refund (prior year) $

Business / Self-Employment (Schedule C)

Self-Employment Income? [ ] Yes [ ] No Business Name Business Type / EIN

Gross Receipts / Sales $ Cost of Goods Sold $ (Attach ledger or complete Section 6 below)

Estimated Tax Payments

Payment #	Date Paid	Federal $	State $
1			
2			
3			
4			

SECTION 4 — INVESTMENT & OTHER INCOME

Interest & Dividend Income (attach 1099-INT / 1099-DIV)

Payer Name	Interest $	Ord. Div. $	Qual. Div. $	Cap. Gain $	Tax Withheld $

Sale of Stocks, Property, or Crypto (attach 1099-B)

Cryptocurrency traded? [ ] Yes [ ] No Total Proceeds $ (Attach all records)

# Units	Description / Name	Date Sold	Date Acquired	Cost Basis $	Sale Price $

Sale of Residence

Sale Price $ Original Purchase Price $ Date Purchased Date Sold Date Moved In Date Moved Out

Ever used as rental? [ ] Yes [ ] No If yes, rental dates Past depreciation deducted $

SECTION 5 — ITEMIZED DEDUCTIONS (bring Form 1095 for health insurance)

Medical Expenses

Health Insurance Premiums $ Prescriptions $ Doctor / Dentist / Hospital $ # Medical Miles

Housing

Mortgage Interest — Primary Home $ Property Taxes — Primary Home $ Auto Registration Fee $

Charitable Contributions

Cash / Money $ Goods / Non-Cash $ (attach receipts) # Charitable Miles Organization Name

Other Deductions

HSA Contributions $ HSA Expenses $ Student Loan Interest $ College Education Exp. $

** Attach Form 1098-T for college education expenses*

SECTION 6 — SELF-EMPLOYMENT / SCHEDULE C EXPENSES (attach receipts or ledger)

Accounting $		Cell Phone $	
Advertising $		Rent/Lease $	
Bank Fees $		Repairs $	
Computer/Software $		Subscriptions/Dues $	
Insurance $		Tools $	

Internet $		Travel $	
Legal/Prof. Fees $		Utilities $	
Meals (50%) $		Wages Paid $	
Merchant Fees $		Payroll Taxes $	
Office Supplies $		Other: _____ $	

Auto / Vehicle Expenses (attach mileage log)

Vehicle Description	Odometer 1/1	Odometer 12/31	Total Miles	Business Miles	% Business	Actual Exp. $

SECTION 7 — RENTAL INCOME & EXPENSES (Schedule E)

	Property 1 — Address	Property 2 — Address	Property 3 — Address
Gross Rental Income $			
Repairs & Maintenance $			
Insurance $			
Mortgage Interest $			
Property Taxes $			
HOA $			
Utilities $			
Management Fees $			
Advertising $			
Supplies / Other $			

** Attach additional sheets for more than 3 rental properties*

SECTION 8 — CHILD & DEPENDENT CARE EXPENSES

#	Provider Name & Address	EIN / SSN	Dates of Care	Amount Paid $	Child Name
1					
2					
3					

SECTION 9 — RETIREMENT CONTRIBUTIONS (* not contributed through W-2 / Box 14)

Taxpayer

Pre-tax / Traditional IRA or 401k $*	Converted to Backdoor Roth $	Post-tax / Roth IRA or 401k $*

Spouse

Pre-tax / Traditional IRA or 401k $*	Converted to Backdoor Roth $	Post-tax / Roth IRA or 401k $*

Do you receive Overtime Pay?		**Do you receive Tips?**	
[ ] Yes [ ] No	If yes, Qualified OT Amount $	[ ] Yes [ ] No	If yes, Qualified Tips Amount $

SECTION 10 — DIRECT DEPOSIT INFORMATION (for refunds)

Bank Name	Routing Number	Account Number	[ ] Checking [ ] Savings

SECTION 11 — DOCUMENTS TO UPLOAD WITH THIS FORM

[ ] All W-2s	[ ] All 1099s (NEC, MISC, R, INT, DIV, B)	[ ] All K-1s
[ ] Mortgage Interest Statement (1098)	[ ] Property Tax Statements	[ ] HSA Forms (5498-SA, 1099-SA)
[ ] Charitable Contribution Receipts	[ ] Education Forms (1098-T)	[ ] Health Insurance (1095-A/B/C)
[ ] Prior Year Return (new clients)	[ ] Business Income/Expense Records	[ ] Any other tax documents received

SECTION 12 — NOTES / QUESTIONS FOR YOUR PREPARER

Upload this completed form + all documents to your secure portal: portal.jktaxut.com

Thank you for your business! — James Pound, EA | David Larson, EA