



2026 Individual Tax Organizer

For tax year 2026 returns filed in 2027. Fill in on screen or print.

How to return this organizer: save the completed form and upload it, with your tax documents, through our secure client portal at silvacpa.clientportal.com. Please do not email this form; it contains sensitive information.

1 Your information

Taxpayer

Full legal name

Social Security number

Date of birth

Occupation

Phone

Email

Spouse (if married)

Full legal name

Social Security number

Date of birth

Occupation

Phone

Email

Home address

Street address

City

State

ZIP

Filing status

☐ Single ☐ Married filing jointly ☐ Married filing separately ☐ Head of household ☐ Qualifying surviving spouse

Dependents

Name	Social Security number	Date of birth	Relationship	Months in your home

2 Questions about your year

Check Yes or No. If you check Yes, add details in the notes section or include related documents.

Did your marital status change, or did you have or adopt a child, during 2026?	☐ Yes	☐ No
Did you move, or live or work in more than one state, during 2026?	☐ Yes	☐ No
Did you buy, sell, or refinance a home or other real estate?	☐ Yes	☐ No
Do you own rental property?	☐ Yes	☐ No
Did you have self-employment, side business, or gig income?	☐ Yes	☐ No
Do you own part of a partnership, S corporation, estate, or trust?	☐ Yes	☐ No
Did you receive, sell, exchange, or otherwise dispose of any digital assets (such as cryptocurrency)?	☐ Yes	☐ No
Did you have a financial account outside the U.S., or more than \$10,000 combined in foreign accounts at any time?	☐ Yes	☐ No
Did you receive tips or overtime pay?	☐ Yes	☐ No
Did you take a distribution from a retirement account or roll one over?	☐ Yes	☐ No
Did you contribute to or take money from a health savings account (HSA)?	☐ Yes	☐ No
Did anyone in your household have health insurance through the Marketplace (healthcare.gov)?	☐ Yes	☐ No
Did you pay college tuition or student loan interest?	☐ Yes	☐ No
Did you pay for child or dependent care so you could work?	☐ Yes	☐ No
Did you make charitable contributions?	☐ Yes	☐ No
Did you make estimated tax payments for 2026? (Complete section 4.)	☐ Yes	☐ No
Did you receive any letters or notices from the IRS or a state tax agency?	☐ Yes	☐ No
Do you want a refund deposited directly? (Send bank details through the portal, not on this form.)	☐ Yes	☐ No

3 Documents to include

Check each document you're uploading. Include every form you received, even if you think it doesn't matter.

- ☐ **W-2 forms**
Wages from each employer
- ☐ **1099-NEC, 1099-MISC, and 1099-K**
Contract, miscellaneous, and payment app or card income
- ☐ **1099-INT, 1099-DIV, and 1099-B**
Interest, dividends, and brokerage sales (the consolidated brokerage statement)
- ☐ **1099-R and SSA-1099**
Retirement distributions and Social Security benefits
- ☐ **Schedule K-1s**
From partnerships, S corporations, estates, and trusts
- ☐ **1099-G**
Unemployment or state tax refunds
- ☐ **1098 mortgage interest statements**
Plus property tax bills if not shown on the 1098
- ☐ **1098-T and 1098-E**
Tuition statements and student loan interest
- ☐ **1095-A**
Marketplace health insurance statement
- ☐ **5498-SA, 1099-SA, and 1099-Q**
HSA and education savings account forms
- ☐ **Charitable contribution receipts**
Cash and noncash; written acknowledgments for gifts of \$250 or more
- ☐ **Child and dependent care provider information**
Provider name, address, tax ID, and amount paid
- ☐ **Business or rental income and expense summary**
Totals by category, plus asset purchases and sales
- ☐ **Closing statements**
For any real estate bought or sold
- ☐ **Copies of IRS or state notices**
Any letters received during the year
- ☐ **New clients only: prior two years' tax returns and photo ID**
Federal and state returns, and a driver's license or passport for each taxpayer

4 2026 estimated tax payments

Payment	Federal date paid	Federal amount	State	State date paid	State amount
Q1 (Apr 15, 2026)					
Q2 (Jun 15, 2026)					
Q3 (Sep 15, 2026)					
Q4 (Jan 15, 2027)					

Include any 2025 overpayment you applied to 2026 in the notes section.

5 Notes and changes

Anything else we should know: new jobs, large purchases, gifts, inheritances, health changes, or questions for us

Thank you. We'll review your organizer and documents and contact you if anything is missing. Questions? Call 385-695-8175 or message us through the client portal.