



Member

American Institute of Certified Public Accountants

Tennessee Society of Certified Public Accountants

www.bryantgreercpas.com

2026/2027 Individual Tax Information Reminder Checklist

Simply bring the relevant items to the office or upload them through our secure client portal. For your protection, please do not email documents containing Social Security or account numbers. If you bring or mail originals, copies will be made as needed, and the originals will be returned with your completed taxes. **THANKS** for your business!

Personal Information

- Copy of 2025 federal and state tax returns (if we did not prepare your 2025 returns)
- Names, Social Security numbers, and birth dates of taxpayer, spouse, and dependents, including any children born in 2026 (please confirm each year; age now affects the new senior deduction)
- Email address, telephone number, and preferred time to contact you
- Bank routing and account number for direct deposit of refunds (the IRS is phasing out paper refund checks)
- IRS Identity Protection PIN (IP PIN), if anyone in your household has one
- Recent IRS or state tax authority correspondence

Income

- Form W-2 from all employers (if you received tips or overtime, please also bring your final 2026 pay stub)
- Cash tips received that were not reported to your employer
- Forms 1099-INT, 1099-DIV, and 1099-B for interest, dividends, and proceeds from stock transactions
- Information from sales of stock, mutual funds, or other significant assets (including amounts originally paid and dates purchased and sold)
- Form 1099-DA and records of any digital asset (cryptocurrency) sales or exchanges
- Forms 1099-NEC, 1099-MISC, and 1099-K for self-employment, gig work, or online sales
- Income and expenses summarized by meaningful categories from any side businesses (QuickBooks Online access or backup file, if applicable)
- Rental income information – income, expenses, original cost, prior depreciation, etc.
- Farm related receipts and expenses (categorized)
- Schedule K-1s from any partnership, S-Corporation, trust, or estate
- Form 1099-R for IRA, pension, or other retirement plan distributions
- Form SSA-1099 for Social Security benefits
- Form 1099-G for unemployment compensation
- Form W-2G for gambling winnings and a log of gambling losses

Deductions and Credits

- Form 1098 for mortgage interest, mortgage insurance (PMI), and property taxes paid
- Refinancing information of mortgage (only if you paid “points”)
- Property taxes paid during the year (real estate, personal property on vehicles, etc.)

- Amounts of 2026 sales taxes paid for big ticket items such as boats, cars, etc.
- New vehicle loan interest – if you bought a new vehicle for personal use, bring the purchase contract (showing the VIN) and the lender's year-end interest statement
- Receipts for all cash charitable contributions, even if you do not itemize. Gifts of \$250 or more must have a letter from the organization. Non-cash contributions must be itemized and valued; items over \$500 need the date acquired and cost, and items over \$5,000 need a qualified appraisal
- Estimated income tax payments (amounts & dates of payments)
- College tuition paid on each student (child or adult) – **must have Form 1098-T from college institution**; Form 1099-Q for any 529 plan distributions
- Student loan interest paid (Form 1098-E)
- Childcare payments (amount, care provider's name, address, and identification number) and any dependent care FSA amounts
- Roth IRA, regular IRA, SIMPLE, and SEP contributions (Form 5498)
- Trump accounts – for children born 2025 through 2028, let us know if you would like to elect the \$1,000 federal contribution, and bring any contribution records
- Medical expenses, including health insurance premiums, long-term care insurance, and prescription drugs; health savings account contributions and distributions (Forms 1099-SA and 5498-SA)
- Form 1095-A (if any) – received from the health insurance marketplace. Please also tell us about any significant income changes during the year
- Documented business mileage records
- Home office expenses (self-employed individuals and business owners only)
- K-12 educator classroom expenses; unreimbursed expenses of armed forces reservists, performing artists, and fee-basis government officials
- Moving expenses (active-duty military and intelligence community members only)

Other

- Household employees (nanny, caregiver, housekeeper) – wages paid and taxes withheld
- Foreign bank accounts, foreign investments, or other foreign assets
- Divorce or separation agreement – date of decree, which parent claims the children (and Form 8332, if applicable), and alimony received/paid for divorces finalized before 2019
- Any other items that you think may have any possible tax impact