



INDIVIDUAL TAX ORGANIZER

Taxpayer Information Questionnaire

Please complete and upload to AFairchild's portal

2026

www.afairchildcpa.com | nicole.branson@afairchildcpa.com | 214-731-7664 | 972-978-8934 direct

Taxpayer Information Questionnaire

Please complete all sections and provide supporting documentation where applicable.

Section 1: Personal Information

Complete all applicable fields

Name

If this is your first year with AFairchild, please list names and birthdays.

Name	Date of Birth
Taxpayer	
Spouse	
Dependent 1	
Dependent 2	
Dependent 3	

Address & Contact Information

Complete if changed from prior-year return

Street Address / PO Box

City

State

ZIP Code

Taxpayer Phone

Email

Spouse Phone

Email

General

YES

NO

If this is the first year for us to prepare your return, please provide a copy of your last 3 years' tax returns.

☐☐

Did your marital status change this year?

☐☐

Have your dependents changed this year?

☐☐

Did any of your dependents have unearned income of \$1,350 or more (\$450 of Self-Employed Income)?

☐☐

Do you want us to prepare your child's tax return?

☐☐

Did any of your dependents, 19-23 years of age, attend school full-time for less than five months during the year?

☐☐

Did you move? If yes, provide a new address. If home bought and/or sold, provide the settlement sheet (Closing Disclosure) and Form 1099-S (if received).

☐☐

Did you make any gift(s) to any person (directly or indirectly to a trust) of more than \$19,000?

☐☐

Has the IRS or any tax agency notified you of changes to a prior-year tax return? If yes, please provide a copy of the letter received.

☐☐

Did you or your dependents receive a Federal IP PIN from the IRS or have you been the victim of identity theft? If yes, please provide a copy of the IRS notice.

☐☐

Did you or your dependents enroll in health insurance through the Health Insurance Marketplace (healthcare.gov)? If yes, please attach Form 1095-A.

☐☐



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Income	YES	NO
Have you provided all W-2s?	☐	☐
Did your employer exclude from your salary any payments for student loans?	☐	☐
Did you receive any tip income or overtime this year?	☐	☐
Have you provided all 1099s? (Including Brokerage Statements)	☐	☐
During this year, did you have any securities that became worthless or loans that became uncollectible?	☐	☐
Have you provided all K-1s?	☐	☐
Did you withdraw amounts from a retirement plan to acquire a personal residence or pay for unreimbursed medical expenses or higher education expenses or was the withdrawal related to certain qualified disasters?	☐	☐
Did you convert IRA funds or any qualified plan funds into a Roth IRA?	☐	☐
Did you inherit an IRA during 2026? If so, did you receive a distribution during the year?	☐	☐
Did you or your spouse turn 73 in 2026 and have money in an IRA or other retirement account without taking any distributions?	☐	☐
Did you or your spouse make a qualified charitable distribution directly from an IRA?	☐	☐
Did you receive any Social Security income or disability payments this year?	☐	☐
Did you receive any unemployment compensation? If yes, provide Form 1099-G, Certain Government Payments.	☐	☐
Did you receive or pay any alimony during the year? If yes, provide details, including the date of the divorce agreement and Social Security number of the spouse paying or receiving the alimony.	☐	☐
Did you have any business income? Make sure to include ALL income and expenses. After a preliminary review, we will call to discuss specific items. (please complete the business form)	☐	☐
Did you have any rental or royalty income?	☐	☐
Did you receive any income from legal proceedings, cancellation of student loans or other indebtedness during the year? If yes, please provide details.	☐	☐
Did you receive any scholarship or fellowship grants not reported on Form W-2?	☐	☐
Were you a resident of, or did you work for a period of time, or receive income from more than one state during the year? If so, please provide details.	☐	☐
Did you have any gambling activities?	☐	☐

Adjustments	YES	NO
Did you, or do you plan to, contribute to a traditional IRA?	☐	☐
Did you, or do you plan to, contribute to a Roth IRA?	☐	☐
If you have self-employment income, would you like to contribute to a retirement plan?	☐	☐
Did you participate in an HSA? If yes, provide Forms 1099-SA and Form 5498-SA.	☐	☐
Did you or your dependents attend college? If yes, how much did you pay for tuition, books, and fees? (Please provide Form 1098-T)	☐	☐
Do you have a student loan? If yes, attach Form 1098-E	☐	☐
Did you incur expenses as an elementary or secondary educator?	☐	☐
Did you install any energy-efficient products in your home, such as insulation, exterior doors, exterior windows, skylights, an energy-efficient AC unit, etc.?	☐	☐
Did you purchase and install any solar water heating, solar electric, fuel cells, small wind energy or geothermal heat pump? If yes, provide details, such as invoices and manufacturer certifications.	☐	☐



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Itemized Deductions	YES	NO
Have you provided all medical & dental expenses?	☐	☐
Did you purchase a car, boat or other large items, including home improvements?	☐	☐
Did you purchase a house or rental property?	☐	☐
Did you refinance any existing loans on your home or other real estate you own? If yes, provide the settlement sheet (Closing Disclosure)	☐	☐
Have you included your mortgage interest statement?	☐	☐
Did you purchase an automobile with a loan this year?	☐	☐
Did you pay real estate taxes on your principal residence, or any other real property owned?	☐	☐
Did you donate to charity (monetary and/or non-monetary)?	☐	☐

Other	YES	NO
Please provide a copy of a voided check or bank account information for direct deposit or direct debit.	☐	☐
If you have a refund, would you like it applied to next year's estimated taxes?	☐	☐
If you receive a refund, would you like that directly deposited into your bank account?	☐	☐
If you owe additional taxes, would you like them directly debited from your bank account?	☐	☐
Have you paid estimated taxes? If yes, please provide supporting documents, including dates and amounts paid.	☐	☐
Did you purchase a clean energy (electric) vehicle on or before September 30, 2026? If yes, provide the documentation provided by the dealer.	☐	☐
Did you install an electric vehicle charging station in your home?	☐	☐
At any time during 2026 did you (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)?	☐	☐
Did you have any foreign income, pay any foreign taxes that are not reflected on an enclosed Form 1099, or file any foreign information reporting or tax forms?	☐	☐
Did you have any interest in, or signature or other authority over, a bank, securities or other financial account in a foreign country?	☐	☐
Do you have a signature authority with a foreign bank account?	☐	☐

Secure submission reminder

Banking information, Social Security numbers, tax documents, and other confidential information should be submitted through AFairchild's secure portal rather than unsecured email.

When complete: upload this organizer and supporting documents to AFairchild's portal.

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