FINANCIAL INTERNATIONAL

2026

Income Tax Organizer

For tax year 2026 • Your step-by-step guide to gathering everything we need to prepare your return.

PREPARED FOR

Client name(s)

Date returned to us

Best phone to reach you

Tax year 2026

QUESTIONS? WE'RE HERE TO HELP

FINANCIAL INTERNATIONAL

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Upload your completed organizer

Save this PDF after filling it in, name the file starting with your last name, then click Upload.

Fill it in online instead: **www.financialinternational.com/Forms/17-tax-organizer.html**

Welcome — let's make tax time easy

Thank you for trusting Financial International with your 2026 tax return. This organizer walks you through everything we need, one numbered tab at a time. Answer the Quick Start questions first — each "Yes" points you to the tab to complete. Skip anything that doesn't apply to you.

1 Fill it in online

Prefer to type? Use our online Tax Organizer. It has the same sections, in the same order and with the same field names as this booklet, so you can switch between paper and online.

2 Upload documents

The online organizer page has our secure SharePoint upload button. No sign-in or account is needed. Start every file name with your last name, e.g. Smith-W2.pdf.

3 Or use this booklet

This PDF is fillable: type into it on your computer, or print it and write by hand. Then upload it with your documents or bring it to your appointment.

ONLINE TAX ORGANIZER + SECURE SHAREPOINT DOCUMENT UPLOAD
www.financialinternational.com/Forms/17-tax-organizer.html

Done? Send it to us

Upload your completed organizer

Save this PDF after filling it in, name the file starting with your last name, then click Upload.

How to fill in this organizer

- **2026 columns** are for this year. Shaded 2025 columns are last year — fill them in only if handy.
- **T/S/J** means Taxpayer, Spouse, or Joint. Write the letter that applies.
- **"Bring:"** notes at the top of each tab name the forms to send (W-2, 1099-NEC, 1098, and so on).
- **Out of rows?** Attach a list or a copy of the page — we'll match it up.
- **Not sure?** Leave it blank and add a note in tab 23. We'll ask at your appointment.
- **Key dates:** April 15 (file, or request an **extension**) / **October 15** (**extended deadline**, **extension** only) — see tab 20.

What to bring

Check off each item as you gather it. The full list is in tab 22.

- ☐ Photo ID for you (and spouse)
- ☐ SSN/ITIN for anyone new in your household
- ☐ W-2s from every employer
- ☐ All 1099s (NEC, MISC, K, INT, DIV, B, R, G, S)
- ☐ SSA-1099 Social Security statements
- ☐ K-1s from partnerships, S-corps, trusts
- ☐ 1098 mortgage interest & property tax bills
- ☐ 1095-A / B / C health coverage forms
- ☐ Business & rental income/expense totals
- ☐ Charity receipts & medical receipts
- ☐ Estimated tax payment records
- ☐ Any IRS or FTB letters you received
- ☐ Last year's return (if you are new to us)
- ☐ Voided check for direct deposit

What's inside

Each numbered tab matches the tab on the right edge of every page. All 23 tabs follow the same order as the online Tax Organizer, and each one lists its matching online page.

01	Quick Start	Online organizer pages 2-3	page 4
02	Personal & Household	Online organizer page 4	page 7
03	Dependents	Online organizer page 4	page 8
04	Wages (W-2)	Online organizer page 5	page 9
05	Other Income & Adjustments	Online organizer page 6	page 10
06	Gambling & Estimated Payments	Online organizer page 7	page 12
07	Retirement & Social Security	Online organizer page 8	page 13
08	Interest & Dividends	Online organizer pages 9-11	page 14
09	Child & Dependent Care	Online organizer page 12	page 16
10	Itemized Deductions	Online organizer page 13	page 17
11	Self-Employment & Home Office	Online organizer pages 14-15	page 19
12	Capital Gains & Sales	Online organizer page 16	page 22
13	Rental & Royalties	Online organizer pages 17-21	page 23
14	Farm Income	Online organizer pages 22-24	page 28
15	K-1 Income	Online organizer pages 25-26	page 30
16	Foreign Earned Income	Online organizer page 27	page 31
17	Business Assets	Online organizer page 28	page 33
			CREDITS, BANKING, EXTENSION & WRAP-UP
18	Credits & Health Coverage	Online organizer page 29	page 34
19	Banking for Your Refund	Online organizer page 30	page 35
20	Extension Request	Online organizer page 31	page 36
21	California	Online organizer page 32	page 37
22	Document Checklist	Online organizer page 33	page 38
23	Signature & Consent	Online organizer page 34	page 39

PROTECTING YOUR INFORMATION

- This organizer asks for sensitive information: Social Security numbers, bank account numbers, and income.
- **DO NOT email your completed organizer or tax documents. Email is not secure. Use only the secure Upload button (Financial International's SharePoint) or deliver them in person.**
- The online organizer sends your answers over an encrypted (HTTPS) connection directly to Financial International.
- Only download this organizer from www.financialinternational.com. Financial International will never email or text you a link asking you to enter your SSN or bank details. If you get one, do not respond; call us at (213) 487-0587.
- If you print it, keep the completed organizer in a safe place and shred spare copies.
- Your information is kept confidential and used only to prepare your tax return.

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01 Quick Start

Online organizer pages 2-3

Answer Yes or No for 2026. Each "Yes" shows the tab (for example → 04) where you give us the details. These are the same questions as the online organizer, grouped into plain-language topics.

Life changes this year

Big events change your taxes. During 2026, did you…

Yes	No		
☐	☐	Get married?	→ 02
☐	☐	Divorce or legally separate?	→ 02
☐	☐	Have or adopt a child?	→ 03
☐	☐	Lose a spouse or dependent (a death in the household)?	→ 02
☐	☐	Move to a new home?	→ 02
☐	☐	Move into or out of California (or another state)?	→ 21
☐	☐	Start, change, or lose a job?	→ 04
☐	☐	Start, buy, sell, or close a business?	→ 11
☐	☐	Buy, sell, or refinance a home?	→ 10
☐	☐	Retire, or start Social Security or retirement payouts?	→ 07
☐	☐	Have a dependent start college or trade school?	→ 18
☐	☐	Gain, lose, or change health insurance?	→ 18
☐	☐	Get a letter from the IRS or the California FTB?	→ 22
☐	☐	Need more time to file? (extension request)	→ 20
☐	☐	Have another big change? Tell us in tab 23.	→ 23

Income you received

During 2026, did you or your spouse receive…

Yes	No		
☐	☐	Wages?	→ 04
☐	☐	Tips?	→ 04
☐	☐	Interest or dividends?	→ 08
☐	☐	Social Security or Tier I Railroad Retirement?	→ 07
☐	☐	A lump sum from an employer-sponsored plan where the recipient and/or employee was born before 1936?	→ 07
☐	☐	A retirement or IRA distribution while under age 59½?	→ 07
☐	☐	Other pension, annuity, IRA, or retirement income?	→ 07
☐	☐	If an IRA distribution: were non-deductible contributions ever made?	→ 07
☐	☐	If yes: can you provide the balance of all IRA accounts at the end of 2026?	→ 07
☐	☐	Unemployment compensation?	→ 05
☐	☐	Alimony?	→ 05
☐	☐	Self-employment income, or income from running a business?	→ 11
☐	☐	Income from operating a farm?	→ 14
☐	☐	Rent from land or property used for farming?	→ 14
☐	☐	Rent from other property?	→ 13
☐	☐	Gambling winnings?	→ 06
☐	☐	Royalties?	→ 13
☐	☐	Other income, such as prizes or jury duty pay?	→ 05

Quick Start (continued)

Tax forms you received

Did you or your spouse receive any of these? Please send them to us.

Yes	No		
☐	☐	W-2	→ 04
☐	☐	W-2G	→ 06
☐	☐	1095-A, -B or -C	→ 18
☐	☐	1099-R	→ 07
☐	☐	1099-INT	→ 08
☐	☐	1099-DIV	→ 08
☐	☐	1099-MISC	→ 05
☐	☐	1099-NEC	→ 11
☐	☐	1099-B	→ 12
☐	☐	1099-S	→ 12
☐	☐	1099-G	→ 05
☐	☐	Any other 1099	→ 05
☐	☐	K-1	→ 15
☐	☐	IRS notice changing a prior-year return	→ 22
☐	☐	Real estate closing statements (sale, purchase, refinance)	→ 12

Things you sold

During 2026, did you or your spouse sell or dispose of…

Yes	No		
☐	☐	Stock, mutual funds, or other non-business assets?	→ 12
☐	☐	Your personal residence?	→ 12
☐	☐	Rental property?	→ 13
☐	☐	Property used in a business or farm?	→ 17
☐	☐	Any other business property not listed above (equipment, land)?	→ 17
☐	☐	If you sold property above: did it involve a bartering agreement?	→ 12
☐	☐	If you sold property above: are you receiving payments in installments?	→ 12

Home, family & money matters

During 2026, did you or your spouse…

Yes	No		
☐	☐	Have a home mortgage?	→ 10
☐	☐	Refinance your home mortgage?	→ 10
☐	☐	Use part of your home only for business?	→ 11
☐	☐	Have medical expenses or pay for health insurance?	→ 10
☐	☐	Give regularly or substantially to charity, church, etc.?	→ 10
☐	☐	If yes: give more than $500 in non-cash items (clothing, goods, property)?	→ 10
☐	☐	Have a casualty loss in a federally declared disaster area?	→ 10
☐	☐	As a member of the Armed Forces, pay job expenses out of pocket or use your own vehicle for the job?	→ 05
☐	☐	Move to be closer to a new job?	→ 05
☐	☐	Pay estimated tax to the IRS or state, or apply a 2025 overpayment to this year?	→ 06
☐	☐	Own an interest in a partnership, S-corporation, estate, or trust that will send you a K-1?	→ 15
☐	☐	Pay a household employee (nanny, caregiver, housekeeper)? We'll confirm whether employment-tax rules apply.	→ 23
☐	☐	Have a qualified fuel tax credit (fuel used off-highway, on a farm, etc.)?	→ 18
☐	☐	Get claimed — or could you be claimed — as a dependent on someone else's return?	→ 02

Did you contribute to any of these retirement plans? ☐ IRA ☐ SEP ☐ Keogh ☐ Roth ☐ SIMPLE → 05

Quick Start (continued)

Family, education & refund

Yes	No		
☐	☐	Did you or your spouse receive, sell, exchange, or otherwise acquire any financial interest in virtual currency (for example, Bitcoin)?	→ 12
☐	☐	Did you, your spouse, or any dependent have insurance through the Marketplace (Covered California)?	→ 18
☐	☐	Did your children have interest and dividend income that you would like to report on your own return instead of the child's? We'll check whether it qualifies.	→ 03
☐	☐	Did you pay child or dependent care expenses?	→ 09
☐	☐	Did you pay college or other post-secondary tuition and related expenses for yourself, your spouse, or dependents?	→ 18
☐	☐	Did you cash US EE or I savings bonds to pay for post-secondary education?	→ 18
☐	☐	Did you pay interest on higher-education (student) loans?	→ 05
☐	☐	Were you a K–12 educator who bought books or classroom supplies?	→ 05
☐	☐	Did you buy a car, boat, aircraft, motor home, or home building materials in 2026, or keep receipts for sales tax on purchases?	→ 10
☐	☐	Were there any births, adoptions, divorces, marriages, or deaths in your household?	→ 03
☐	☐	Would you like your refund by direct deposit? (Attach a voided check.)	→ 19

02 Personal & Household

Online organizer page 4

Tell us who is filing and how to reach you. If you are married, fill in both columns.

Bring: Photo ID (driver's license or state ID) for you and your spouse. Social Security card or ITIN letter if a name or number changed.

You and your spouse

	You (taxpayer)	Spouse (last name only if different)
First name		
Middle initial		
Last name		
Suffix (Jr., Sr., III)		
Social Security number		
Date of birth		
Occupation		
Daytime phone		
Evening phone		
Cell phone		
Email address		

Home address

Present home address (street, apt.)

City, State, ZIP code

Filing status

Check one. Not sure? Leave it blank and we'll recommend the best one.

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

Head of household but no dependents listed in tab 03? Name and SSN of the qualifying child who lives with you

State residency

State of residence (2-letter, e.g. CA)

Part-year resident of another state? Which?

Second part-year state

Comments for your preparer

Anything we should know about you or your household this year.

03 Dependents

Online organizer page 4

List everyone you support: children, relatives, or others who lived with you. Include children who qualify you for child-care or earned-income credits even if they are not your dependents, and check "Not a dependent".

Bring: Social Security card or ITIN for each new dependent; birth or adoption papers for a new child; Form 8332 or the divorce/separation agreement if you claim a child who did not live with you.

Your dependents

First name	Last name	Date of birth	Social Security no.	Relationship	Months in your home	Not a dependent
						☐
						☐
						☐
						☐
						☐
						☐

Rows 5–6 are extra paper rows. More dependents? Attach a list with the same columns.

Claiming a child who did not live with you?

Check the document(s) that support the claim:

- ☐ Pre-1985 divorce or separation agreement
- ☐ Signed Form 8332
- ☐ Post-1984 divorce or separation agreement WITHOUT conditions

Children’s investment income

If a child had interest or dividend income, answer the children’s interest and dividends question in tab 01 and send the child’s 1099-INT / 1099-DIV forms. We’ll tell you whether it can be reported on your return.

04 Wages (W-2)

Online organizer page 5

List each employer you or your spouse worked for in 2026.

Bring: A Form W-2 from every 2026 employer (including part-time, seasonal, and household jobs). Tip records if you had tips not shown on a W-2.

Employer name	Street address	City, State, ZIP	Employer ID (EIN)	You	Spouse
				☐	☐
				☐	☐
				☐	☐
				☐	☐
				☐	☐
				☐	☐
				☐	☐
				☐	☐

Rows 7–8 are extra paper rows (the online organizer has six employers).

05 Other Income & Adjustments

Online organizer page 6

Income that doesn't come on a W-2, and payments that reduce your income before deductions.

Bring: 1099-G (unemployment or state refund), 1099-MISC and other 1099s, alimony records, 1098-E (student loan interest), IRA/SEP/Roth contribution records (Form 5498), health premium records if self-employed.

Seller-financed mortgage you hold

A buyer pays you on a mortgage you carry

Payer (name and address)	Principal received 2026	Interest 2026	Interest 2025

State and local income tax refunds received in 2026

State or local jurisdiction	Amount received

Unemployment, alimony & other income

	2026	2025
Unemployment received (attach 1099-G)		
Unemployment repaid		
Alimony received		

Other income — type (prizes, jury duty, awards, etc.)	Amount

Other Income & Adjustments (continued)

Adjustments to income

Payments that reduce your income before deductions

	You 2026	You 2025	Spouse 2026	Spouse 2025
Educator expenses (K–12)				
Self-employed retirement plans (SEP, SIMPLE, Keogh)				
Self-employed health insurance paid				
IRA contributions — Traditional				
IRA contributions — Roth				
Student loan interest paid (1098-E)				
HSA contributions (not through payroll)				

Alimony paid — to whom

Recipient's SSN

Date of divorce/separation agreement

Amount paid

Other adjustments — type (e.g. Armed Forces job or moving expenses)

Amount

06 Gambling & Estimated Payments

Online organizer page 7

Gambling winnings reported on Form W-2G, and any tax you prepaid for 2026.

Bring: Every Form W-2G. Records of each federal (IRS) and state estimated payment — dates and amounts — such as bank records or IRS/FTB online confirmations.

Gambling winnings (W-2G payers)

Payer name	Street address	City, State, ZIP	Federal ID number	You	Spouse
				☐	☐
				☐	☐
				☐	☐

Estimated tax paid for the 2026 tax year

Only payments for 2026, including any made in January 2027.

FEDERAL (IRS)		STATE (e.g. CA)		
Date paid	Amount paid	State	Date paid	Amount paid

	Federal	State
2025 overpayment applied to 2026		

	Amount
State/local income tax balance due for previous years, paid in 2026	
State/local estimate for 2025, due January 15, 2026, paid on or after January 1, 2026	

07 Retirement & Social Security

Online organizer page 8

Pensions, annuities, IRA and 401(k) distributions, and Social Security benefits.

Bring: Every 1099-R; SSA-1099 (Social Security) or RRB-1099 (Railroad Retirement); year-end balances of ALL IRA accounts if you ever made non-deductible IRA contributions.

Pension, annuity & IRA payers (1099-R)

Payer name	Street address	City, State, ZIP	Payer ID (EIN)	You	Spouse	IRA
				☐	☐	☐
				☐	☐	☐
				☐	☐	☐
				☐	☐	☐
				☐	☐	☐
				☐	☐	☐

Rows 5–6 are extra paper rows (the online organizer has four).

Year-end 2026 balance of all IRA accounts (only if non-deductible contributions were ever made)

Social Security benefits (SSA-1099 / RRB-1099)

	2026 amount	2025 total
Your benefits		
Spouse's benefits		

08 Interest & Dividends

Online organizer pages 9-11

Bank, brokerage, bond, and fund income.

Bring: 1099-INT, 1099-OID, 1099-DIV, and brokerage "consolidated 1099" statements. Records for a seller-financed mortgage if a buyer pays you interest.

Interest income

T/S/J = Taxpayer, Spouse, or Joint

Name of payer (bank, brokerage, etc.)	T/S/J	2026 interest	Tax-exempt interest	2025 amount

Interest from a seller-financed mortgage

Payer's name, address, and SSN or EIN

Payer name

Payer SSN / EIN

Interest received

Payer city, State, ZIP

Interest adjustments

	2026	2025
Nominee interest (received for someone else)		
Accrued interest paid on bonds you bought		
Tax-exempt interest		
OID (original issue discount) adjustment		
ABP (amortizable bond premium) adjustment		

Interest & Dividends (continued)

Dividend income

T/S/J	Name of payer	2026 ordinary dividends	Qualified dividends	Capital gain distributions	2025 ordinary

Nominee distribution dividends (received for someone else)

09 Child & Dependent Care

Online organizer page 12

Daycare, preschool, after-school programs, day camp, or in-home care you paid for so you (and your spouse) could work or look for work.

Bring: Each provider's name, address, and SSN or EIN (a provider statement or Form W-10 works), plus the amount paid to each provider and for each child.

Care providers

Provider name	Street address	City, State, ZIP	SSN or EIN	Paid 2026	Paid 2025

Row 5 is an extra paper row (the online organizer has four providers).

Amount spent for each child

Child's name	Total spent for this child's care in 2026

10 Itemized Deductions

Online organizer page 13

Medical costs, taxes, mortgage interest, and gifts to charity. We'll compare itemizing with the standard deduction for you.

Bring: Form 1098 (mortgage interest and points), property tax bills, DMV registration renewal, medical and dental receipts, charity receipts, and closing statements for a home purchase or refinance.

Medical and dental

Don't list amounts paid with pre-tax dollars (HSA/FSA) or that were reimbursed.

Prescriptions, doctors, dentists, nurses, hospitals, medical insurance premiums, non-prescription medical supplies (e.g. crutches), and medical miles or actual travel expense.

Description	T/S/J	2026	2025
Medical/dental total (or one total instead of items)			
Number of medical miles			

Taxes paid

	T/S/J	2026	2025
Real estate (property) taxes			
Personal property taxes (e.g. vehicle license fee)			
Other taxes (describe below)			

Describe other taxes

Big purchases (vehicle, boat, RV, building materials): item & sales tax paid

Interest paid

	T/S/J	2026	2025
Home mortgage interest (Form 1098)			
Points paid when buying a new home			
Investment interest expense			

Itemized Deductions (continued)

Gifts to charity

Receipts are required for all contributions.

Charity name (cash gifts)	T/S/J	2026	2025
Cash contributions — total			
Non-cash contributions (clothing, goods) — total			
Number of charity miles driven			

Non-cash items: what you gave, to whom, and when (attach details if over $500)

11 Self-Employment & Home Office

Online organizer pages 14-15

Freelance, gig, contractor, or small-business income (Schedule C). One business per set of pages — copy them for a second business.

Bring: 1099-NEC, 1099-MISC and 1099-K forms; a profit-and-loss summary or bank/credit-card totals by category; mileage log; home-office square footage and home expenses; receipts for equipment bought (also list it in tab 17).

About the business

Your principal business or profession

Whose business?
- [ ] This is my spouse's business

Business name

Business code (from 2025 return, if known)

Business address

Employer ID (EIN — not SSN)

Accounting method
- [ ] Cash
- [ ] Accrual
- [ ] Other

Date sold or closed (if during 2026)

Business vehicle

	2026	2025
Date placed in service		
Miles driven for business		
Commuting miles		
Other (personal) miles		

Income

	2026	2025
Gross receipts or sales		
Returns and allowances		
Other income		

Self-Employment & Home Office (continued)

Expenses

	2026	2025		2026	2025
Advertising			Pension & profit sharing		
Car/truck expenses			Rent/lease — vehicles, machinery		
Commissions			Rent — other business property		
Contract labor			Repairs & maintenance		
Depletion			Supplies		
Employee benefit programs			Taxes & licenses		
Insurance			Travel		
Interest — mortgage			Meals and entertainment		
Interest — other			Utilities		
Legal & professional services			Wages		
Office expense			Prior-year unallowed loss (if any)		

Other expenses

Not listed above — describe each

Description	2026	2025

Inventory (if you sell products)

Inventory method: ☐ Cost ☐ Lower of cost or market ☐ Other

	2026	2025
Inventory at beginning of year		
Purchases (less cost of items taken for personal use)		
Inventory at end of year		

Self-Employment & Home Office (continued)

Office in the home (Form 8829)

Space used regularly and only for business

Sq. ft. used for business

Total sq. ft. of home

Whose business?

☐ Spouse's Schedule C

Date sold/closed (if any)

Day-care facility?

☐ Yes, home used for day care

Days used for day care

Hours per day used for day care

	DIRECT — OFFICE AREA ONLY		WHOLE HOME	
Expense	2026	2025	2026	2025
Casualty losses				
Deductible mortgage interest				
Real estate taxes				
Insurance				
Rent				
Repairs and maintenance				
Utilities				
Other expenses				

	Amount
Carryover of operating expenses from 2025 Form 8829 (line 42)	
Carryover of excess casualty losses and depreciation from 2025 Form 8829 (line 43)	
Fair market value of your home	
Cost of your home	
Value of the land your home sits on	

12 Capital Gains & Sales

Online organizer page 16

Sales of stocks, bonds, mutual funds, crypto, and other non-business assets. If your broker sends a 1099-B, you can just send it and skip the table.

Bring: 1099-B and brokerage year-end statements; 1099-DA or exchange records for crypto; 1099-S and closing statements for real estate sold; purchase records (cost basis) for anything sold; installment-sale or barter details if they apply.

Description (e.g. 100 sh. XYZ Corp)	Date acquired	Date sold	Sales price	Cost (basis)

Rows 10–14 are extra paper rows (the online organizer has nine).

	Amount
Short-term capital loss carryover from 2025	
Long-term capital loss carryover from 2025	

13 Rental & Royalties

Online organizer pages 17-21

Rental real estate and royalty income (Schedule E): up to six properties, plus three part-year, part-rental, or personal-use units.

Bring: A yearly summary of rents; 1099-MISC/1099-K for rents or royalties; 1098 mortgage statements; property tax bills; insurance, repair, management, and utility bills; closing statement for any property bought or sold.

Properties A–C

	PROPERTY A		PROPERTY B		PROPERTY C	
	2026	2025	2026	2025	2026	2025
Kind of property						
Street address						
City						
State						
ZIP						
INCOME						
Rent received						
Royalties received						
EXPENSES						
Advertising						
Auto and travel						
Cleaning and maintenance						
Commissions						
Insurance						
Legal, professional fees						
Management fees						
Mortgage interest						
Other interest						
Repairs						
Supplies						
Taxes						
Utilities						
MISCELLANEOUS EXPENSES						
Misc. expense 1 — type						
Misc. expense 1 — amount						
Misc. expense 2 — type						
Misc. expense 2 — amount						
Misc. expense 3 — type						
Misc. expense 3 — amount						
Misc. expense 4 — type						
Misc. expense 4 — amount						
Loss carryover to 2026						
Actively participate?	☐ Yes ☐ No		☐ Yes ☐ No		☐ Yes ☐ No	
Any personal use?	☐ Yes ☐ No		☐ Yes ☐ No		☐ Yes ☐ No	

Rental & Royalties (continued)

Properties D–F

	PROPERTY D		PROPERTY E		PROPERTY F	
	2026	2025	2026	2025	2026	2025
Kind of property						
Street address						
City						
State						
ZIP						
INCOME						
Rent received						
Royalties received						
EXPENSES						
Advertising						
Auto and travel						
Cleaning and maintenance						
Commissions						
Insurance						
Legal, professional fees						
Management fees						
Mortgage interest						
Other interest						
Repairs						
Supplies						
Taxes						
Utilities						
MISCELLANEOUS EXPENSES						
Misc. expense 1 — type						
Misc. expense 1 — amount						
Misc. expense 2 — type						
Misc. expense 2 — amount						
Misc. expense 3 — type						
Misc. expense 3 — amount						
Misc. expense 4 — type						
Misc. expense 4 — amount						
Loss carryover to 2026						
Actively participate?	☐ Yes ☐ No		☐ Yes ☐ No		☐ Yes ☐ No	
Any personal use?	☐ Yes ☐ No		☐ Yes ☐ No		☐ Yes ☐ No	

Rental & Royalties (continued)

Part-year, part-rental, or personal-use unit 1

e.g. a vacation home you also rent out, or a room you rent out

Kind of property

Location

Rent received 2026

Rent received 2025

% rented (time/property) 2026

% rented 2025

	RENTAL AND PERSONAL USE		RENTAL ONLY	
Expense	2026	2025	2026	2025
Advertising				
Auto and travel				
Cleaning and maintenance				
Commissions				
Insurance				
Legal and professional fees				
Management fees				
Mortgage interest				
Other interest				
Repairs				
Supplies				
Real estate tax				
Taxes other than real estate				
Utilities				
Other expenses				

Personal-use unit only: fully deductible rental expenses (directly for the rental activity, e.g. office supplies)

Rental & Royalties (continued)

Part-year, part-rental, or personal-use unit 2

e.g. a vacation home you also rent out, or a room you rent out

Kind of property

Location

Rent received 2026

Rent received 2025

% rented (time/property) 2026

% rented 2025

	RENTAL AND PERSONAL USE		RENTAL ONLY	
Expense	2026	2025	2026	2025
Advertising				
Auto and travel				
Cleaning and maintenance				
Commissions				
Insurance				
Legal and professional fees				
Management fees				
Mortgage interest				
Other interest				
Repairs				
Supplies				
Real estate tax				
Taxes other than real estate				
Utilities				
Other expenses				

Personal-use unit only: fully deductible rental expenses (directly for the rental activity, e.g. office supplies)

Rental & Royalties (continued)

Part-year, part-rental, or personal-use unit 3

e.g. a vacation home you also rent out, or a room you rent out

Kind of property

Location

Rent received 2026

Rent received 2025

% rented (time/property) 2026

% rented 2025

	RENTAL AND PERSONAL USE		RENTAL ONLY	
Expense	2026	2025	2026	2025
Advertising				
Auto and travel				
Cleaning and maintenance				
Commissions				
Insurance				
Legal and professional fees				
Management fees				
Mortgage interest				
Other interest				
Repairs				
Supplies				
Real estate tax				
Taxes other than real estate				
Utilities				
Other expenses				

Personal-use unit only: fully deductible rental expenses (directly for the rental activity, e.g. office supplies)

14 Farm Income

Online organizer pages 22-24

Farming (Schedule F) and farm rental based on crops or livestock (Form 4835), side by side — the expense list is the same for both. Use the accrual column only if your farm uses the accrual method.

Bring: Sales records, 1099-G (agricultural program payments), 1099-PATR (co-op distributions), CCC loan papers, crop insurance statements, expense receipts, and inventory counts.

About the farm

Schedule F: your principal product

Activity code (from 2025, if known)

Whose farm?
☐ Spouse's Sch. F

Schedule F: Employer ID (not SSN)

Schedule F: date sold/disposed (if any)

Form 4835: Employer ID (not SSN)

Form 4835: date sold/disposed (if any)

Farm income

	SCHEDULE F (CASH)		SCH. F ACCRUAL ONLY		FARM RENTAL 4835	
	2026	2025	2026	2025	2026	2025
Sales of livestock & other items bought for resale						
Cost or other basis of those resale items						
Sales of livestock, produce, grains, crops & other raised products						
Total cooperative distributions						
Agricultural program payments						
Commodity Credit Corporation loans						
Crop insurance / disaster payments						
Custom hire income						
Other income						
Inventory at beginning of year						
Cost of inventory bought during year						
Inventory at end of year						

Farm Income (continued)

Farm expenses

	SCHEDULE F		FARM RENTAL (FORM 4835)	
Expense	2026	2025	2026	2025
Car and truck expenses				
Chemicals				
Conservation expenses				
Custom hire				
Employee benefit programs				
Feed purchases				
Fertilizer and lime				
Freight and trucking				
Gasoline, fuel and oil				
Insurance				
Interest — mortgage				
Interest — other				
Labor hired				
Pension and profit-sharing plans				
Rent/lease — vehicles, machinery, equipment				
Rent/lease — other business property				
Repairs and maintenance				
Seeds and plants purchased				
Storage and warehousing				
Supplies				
Taxes				
Utilities				
Veterinary, breeding and medicine				
Prior-year unallowed loss (if any)				

15 K-1 Income

Online organizer pages 25-26

Partnerships, S-corporations, estates, and trusts send you a Schedule K-1. K-1s often arrive late — list what you expect so we can watch for it.

Bring: Every Schedule K-1 received for 2026 (from Form 1065, 1120-S, or 1041), including state K-1s.

Partnerships & S-corporations

Name of partnership or S-corporation	Federal ID number	P = partnership S = S-corp

Estates & trusts

Name of estate or trust	Federal ID number	Rental real estate: active participant?
		☐ Yes ☐ No
		☐ Yes ☐ No
		☐ Yes ☐ No
		☐ Yes ☐ No
		☐ Yes ☐ No
		☐ Yes ☐ No
		☐ Yes ☐ No
		☐ Yes ☐ No
		☐ Yes ☐ No

Partnership row 9 and estate/trust rows 8–9 are extra paper rows.

16 Foreign Earned Income

Online organizer page 27

For U.S. citizens or residents who lived and worked outside the U.S. (Form 2555).

Bring: Foreign pay statements, employer letters about housing and allowances, a travel calendar or passport stamps showing days in and out of the U.S., and visa/contract papers.

☐ This is my spouse's foreign earned income

Addresses

	2026	2025
Your foreign address		
Employer		
Employer U.S. address		
Employer foreign address		

Residence

	2026	2025
Your tax home overseas (city, country)		
Date established		
Bona fide residence began		

Foreign income

	2026	2025
EARNED INCOME		
Earned income (total)		
Salary		
NON-CASH INCOME		
Home		
Meals		
Car		
Other non-cash		
ALLOWANCES & REIMBURSEMENTS		
Cost of living & overseas differential		
Family		
Education		
Home leave		
Quarters		
Other allowances		

Foreign Earned Income (continued)

Travel history during 2026

Country	Date arrived	Date left	Business days in U.S.	Amount earned in U.S.

A few more questions

Foreign living quarters: ☐ Purchased home ☐ Rented house or apartment ☐ Employer housing

Yes	No	
☐	☐	Did your family live with you overseas?

If so, who? _____ For what period? _____

Yes	No	
☐	☐	Have you told the authorities overseas that you are not a resident of their country?
☐	☐	Are you required to pay income tax to the country where you claim residence?

How long is your overseas work contract? _____ What kind of visa are you working under? _____

Length or employment limits of your visa _____

U.S. home you kept while overseas — address _____ If rented: occupant's name _____ Relationship _____

17 Business Assets

Online organizer page 28

Equipment, vehicles, furniture, buildings, and improvements used in a business, rental, or farm.

Bring: Purchase invoices or closing statements for assets bought; sale paperwork for anything sold, traded, junked, or taken out of service in 2026.

Assets bought or placed in service in 2026

Description	Date acquired	Cost	For schedule (C, E, F)

Assets sold, traded, junked, or taken out of service in 2026

Description	Date acquired	Date sold	Sales price	Sales expenses	Cost	Prior depreciation	From sch.

Acquisition rows 8–10 and disposition rows 6–8 are extra paper rows.

18 Credits & Health Coverage

Online organizer page 29

Education, home energy and clean-vehicle purchases, fuel tax, and health insurance. Whether a credit applies depends on dates, income, and current law — just tell us what you paid and we'll do the rest.

Bring: 1098-T from each school plus receipts for books and required supplies; savings bond redemption records; invoices for energy improvements; the clean-vehicle seller report and purchase contract; 1095-A, 1095-B, 1095-C.

Education (tuition & related expenses)

Student	School	Got a 1098-T	Tuition & fees paid	Books & supplies	Scholarships / grants
		☐			
		☐			
		☐			

US EE / I savings bonds cashed for education — amount

Home energy improvements

Improvement (solar, heat pump, windows, battery…)	Home address	Date installed	Total cost

Electric or clean vehicle bought

Year, make & model

VIN

Date bought / placed in service

Purchase price

Condition ☐ New ☐ Used

Dealer gave you a seller report? ☐ Yes ☐ No

Credit transferred to dealer? ☐ Yes ☐ No

Fuel tax credit

Fuel used off-highway, on a farm, or for another qualified use — describe the use and gallons

Health insurance coverage

Forms received: ☐ 1095-A (Marketplace / Covered California) ☐ 1095-B ☐ 1095-C

Marketplace policy number

Who was covered on the Marketplace policy?

Months covered by the Marketplace policy in 2026:

☐ Jan ☐ Feb ☐ Mar ☐ Apr ☐ May ☐ Jun ☐ Jul ☐ Aug ☐ Sep ☐ Oct ☐ Nov ☐ Dec

Changes during the year (income, household size, move, coverage ended)

19 Banking for Your Refund

Online organizer page 30

Direct deposit is the fastest way to get a refund. Double-check every digit — a wrong number can delay your refund.

Bring: A voided check or a bank letter showing the routing and account numbers.

Direct deposit account

Bank name

Name(s) on the account

Routing number (9 digits)

Account number

Account type

☐ Checking ☐ Savings

Yes	No	
☐	☐	If you owe tax, may we set up an electronic withdrawal from this account (you choose the date)?
☐	☐	Should a state (California) refund go to this same account?

WHERE TO FIND THE NUMBERS ON A CHECK

YOUR NAME 1234

123456789 routing number

00012345678 account number

1234 check number (leave out)

20 Extension Request

Online organizer page 31

Need more time to get your paperwork together? We can request an extension of time to file for you.

Bring: Your best estimate of what you will owe (we can help), and how you would like to pay it.

Key dates

April 15

Original filing deadline. File your return, or request an **extension**, by this date.

October 15

Extended deadline — only for clients who requested an **extension** by April 15.

Your request

☐ **Please file an extension (Form 4868 federal) for me**

An extension gives more time to FILE, not to pay. If you owe a balance, interest (and possibly penalties) accrue from April 15 until it is paid.

Payment with the extension

Estimated tax due (federal)

Amount you are paying with the extension

Date requested

Payment method

☐ Direct debit from the account in tab 19 (Banking) ☐ Check ☐ Other:

California

California provides an automatic extension of time to file until October 15. As with the federal extension, it is more time to file, not more time to pay — we'll let you know if a California payment is due by April 15.

California tax you expect to owe (if known)

Amount paying to California by April 15

Notes about your extension

21 California

Online organizer page 32

California has its own residency, renter, and health-coverage rules. These answers help us complete your California return.

Bring: Covered California Form FTB 3895 (if you had Marketplace coverage), DMV registration renewal notices, Form 593 if California real estate was sold, and any Franchise Tax Board (FTB) letters.

Residency

Yes	No	
☐	☐	Were you (and your spouse) California residents for all of 2026? → 02

If not: date you moved into California

Date you moved out of California

Other state you lived in

Yes	No	
☐	☐	Did you have income that was also taxed by another state?

Which state(s), and what income?

Renters

Yes	No	
☐	☐	Did you rent the home you lived in, in California, during 2026?
☐	☐	Was that rental property exempt from property tax (for example, some public housing)?

Rental address

Months rented in 2026

Same address all year? ☐ Yes ☐ No

Landlord's name and address

Health coverage

Yes	No	
☐	☐	Did everyone in your household have qualifying health coverage for every month of 2026? → 18

If not: who, and which months?

Received FTB 3895? ☐ Yes

Other California items

Yes	No	
☐	☐	Did you sell California real estate with tax withheld at closing (Form 593)? → 12
☐	☐	Did you receive a letter or notice from the Franchise Tax Board? → 22

DMV vehicle registration — which vehicle(s)

Vehicle license fee paid

Other California notes

California estimated payments go in tab 06 (enter "CA" as the state).

22 Document Checklist

Online organizer page 33

Check each item you are sending. Upload documents securely from the online organizer page — start each file name with your last name (e.g. Smith-1099B.pdf).

You & your household

- [ ] Photo ID for you and spouse
- [ ] SSN/ITIN for new dependents
- [ ] Last year's tax returns (if new to us)
- [ ] IRS Identity Protection PIN letter, if any
- [ ] IRS / FTB notices and letters
- [ ] Divorce/separation papers, Form 8332

Income

- [ ] W-2 (all employers)
- [ ] W-2G gambling winnings
- [ ] 1099-NEC, 1099-MISC, 1099-K
- [ ] 1099-INT, 1099-OID, 1099-DIV
- [ ] 1099-B, 1099-DA, brokerage statements
- [ ] 1099-R pensions, IRAs, annuities
- [ ] SSA-1099 / RRB-1099
- [ ] 1099-G unemployment, state refund
- [ ] 1099-S and closing statements
- [ ] Schedule K-1s
- [ ] Crypto transaction records
- [ ] Business income & expense summary
- [ ] Rental income & expense summary
- [ ] Farm records
- [ ] Foreign income & residence records

Deductions & credits

- [ ] 1098 mortgage interest
- [ ] Property tax bills
- [ ] DMV registration renewal
- [ ] Medical & dental receipts
- [ ] Charity receipts
- [ ] 1098-E student loan interest
- [ ] 1098-T tuition statements
- [ ] Child-care provider statements
- [ ] IRA contribution records (5498)
- [ ] HSA forms 5498-SA / 1099-SA
- [ ] Energy improvement / EV invoices
- [ ] Asset purchase & sale paperwork

Payments, coverage & banking

- [ ] Estimated tax payment records
- [ ] 1095-A / B / C, FTB 3895
- [ ] Form 593 (CA real estate withholding)
- [ ] Voided check for direct deposit
- [ ] This organizer, completed and signed

! PROTECTING YOUR INFORMATION

- This organizer asks for sensitive information: Social Security numbers, bank account numbers, and income.
- **DO NOT email your completed organizer or tax documents. Email is not secure. Use only the secure Upload button (Financial International's SharePoint) or deliver them in person.**
- The online organizer sends your answers over an encrypted (HTTPS) connection directly to Financial International.
- Only download this organizer from www.financialinternational.com. Financial International will never email or text you a link asking you to enter your SSN or bank details. If you get one, do not respond; call us at (213) 487-0587.
- If you print it, keep the completed organizer in a safe place and shred spare copies.
- Your information is kept confidential and used only to prepare your tax return.

23 Signature & Consent

Online organizer page 34

Please review, sign, and date. A typed name is fine when you return this PDF electronically.

Anything else we should know?

Household employees, unusual events, questions for us

Your confirmation

I/we have provided the information in this organizer and the documents listed, and to the best of my/our knowledge it is true, correct, and complete. I/we understand Financial International will rely on this information to prepare my/our 2026 income tax returns and may contact me/us with questions. I/we will review the completed returns before they are filed.

☐ **I/we agree with the statement above.**

Taxpayer signature (or typed name)

Date

Spouse signature (or typed name)

Date

Upload your completed organizer

Save this PDF after filling it in, name the file starting with your last name, then click Upload.

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Received by

Date received

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☐ Online ☐ Upload ☐ Paper