2026 Individual Tax Preparation Worksheet

Uncle Joe Tax Services
2113 Miami Street, South Bend, IN 46613
Phone: 574-222-1351

Please fill out this worksheet to the best of your ability and bring it along with your supporting documents to your tax preparation appointment. This helps us maximize your refund and ensure accurate filing.

SECTION 1: Personal Information

Full Name(s): _____
Current Address: _____
City, State, ZIP: South Bend, IN _____
Phone Number: _____ Email: _____
Filing Status:
[ ] Single [ ] Married Filing Jointly [ ] Married Filing Separately
[ ] Head of Household [ ] Qualifying Surviving Spouse
Did your marital status change in 2026? [ ] Yes [ ] No
(If yes, date of change: _____)

SECTION 2: Dependents (if applicable)

Please list all dependents. If you paid for childcare so you could work, please include provider info at the bottom.

Dependent 1:
Name: _____ Relationship: _____ DOB: _____
SSN: _____
Lived with you >6 mos? [ ] Yes [ ] No | Student under 24? [ ] Yes [ ] No

Dependent 2:
Name: _____ Relationship: _____ DOB: _____
SSN: _____
Lived with you >6 mos? [ ] Yes [ ] No | Student under 24? [ ] Yes [ ] No

Dependent 3:
Name: _____ Relationship: _____ DOB: _____
SSN: _____
Lived with you >6 mos? [ ] Yes [ ] No | Student under 24? [ ] Yes [ ] No

Childcare Provider Info (if applicable):
Provider Name: _____ Phone: _____

Address: _____
Tax ID (SSN or EIN): _____ Total Paid in 2026: $_____

SECTION 3: Income Summary

Please check all that apply and attach the corresponding tax forms.
[ ] W-2 Wages:
Employer 1: _____ Total Wages: $_____
Employer 2: _____ Total Wages: $_____
[ ] 1099-NEC / 1099-K (Gig Work / Side Hustles):
Gross Income: $_____ *(Attach records of business expenses: $_____)*
[ ] 1099-INT / 1099-DIV (Interest & Dividends): Total: $_____
[ ] 1099-R (Retirement / Pension / IRA Distributions): Total: $_____
[ ] Social Security Benefits (SSA-1099): Total Received: $_____
[ ] Unemployment Compensation (1099-G): Total: $_____
[ ] Other Income (Rental, Alimony, Gambling, etc.):
Describe: _____ Amount: $_____

SECTION 4: Adjustments to Income

These reduce your taxable income even if you take the Standard Deduction.
[ ] Educator Expenses (up to $300): $_____
[ ] Student Loan Interest Paid: $_____
[ ] Traditional IRA Contributions: $_____
[ ] Health Savings Account (HSA) Contributions: $_____
[ ] Self-Employed Health Insurance Premiums / SEP IRA: $_____

SECTION 5: Deductions

For 2026, the Standard Deduction is $16,100 (Single), $32,200 (Married Filing Jointly), or $24,150 (Head of Household). We will help you determine if itemizing is better for you.
If you think you might itemize, please provide totals for:
[ ] Mortgage Interest (Form 1098): $_____
[ ] State and Local Taxes (SALT) paid (Property tax + State income tax, max $10,000): $_____
[ ] Charitable Contributions (Cash & Non-Cash): $_____ *(Receipts required for donations ≥ $250)*
[ ] Unreimbursed Medical/Dental Expenses (only if > 7.5% of your AGI): $_____

SECTION 6: Tax Credits & Payments

[ ] Child Tax Credit: Do you have qualifying children under age 17? [ ] Yes [ ] No

[ ] Education Credits (1098-T): Did you or your dependent pay college tuition/fees? [ ] Yes [ ] No
[ ] Earned Income Tax Credit (EITC): Did you earn less than ~$60,000? [ ] Yes [ ] No
[ ] Federal Income Tax Withheld (Total from all W-2s/1099s): $_____
[ ] Estimated Tax Payments Made in 2026: $_____

SECTION 7: Refund or Balance Due Preference

I expect a: [ ] Refund [ ] Balance Due
If Refund, I would like it via:
[ ] Direct Deposit
Bank Name: _____ Routing #: _____ Account #: _____

☑ DOCUMENT CHECKLIST: What to Bring to Your Appointment

[ ] This completed worksheet
[ ] Government-issued Photo ID (Driver's License, State ID, or Passport)
[ ] Social Security Cards or ITIN letters for all taxpayers and dependents
[ ] All 2026 Tax Forms (W-2, 1099s, SSA-1099, 1098, 1098-T, etc.)
[ ] 2025 Tax Return (helpful for comparison and carryover info)
[ ] Receipts for charitable donations, medical expenses, or education costs
[ ] Childcare provider's Name, Address, and Tax ID (SSN or EIN)
[ ] Bank account routing and account numbers for direct deposit

Disclaimer: This worksheet is for informational and organizational purposes only and does not constitute official tax advice. Tax laws are subject to change. Uncle Joe Tax Services will prepare your return based on the most current IRS guidelines for the 2026 tax year.