

## Tax Review Checklist

**Problem: Do you have everything to make the most of your tax review?**

**Solution: Utilize this form to make the most out of your tax review!**

- Copy of W-2 Forms
- Copy of Last Year's Tax Return
- Copy of Brokerage Statements
- Copy of Retirement Account Statements
- Copy of K-1 Forms
- Copy of Social Security Statements
- Copy of Rental Income Records
- Copy of 1099s

### Itemized Contributions:

Mortgage Interest \_\_\_\_\_  
 Property Taxes Paid \_\_\_\_\_  
 Charitable Donations \_\_\_\_\_  
 Medical & Dental Expenses \_\_\_\_\_  
 Education Expenses \_\_\_\_\_  
 Investment Interest \_\_\_\_\_  
 State and Local Taxes \_\_\_\_\_

### Miscellaneous:

529 Contributions \_\_\_\_\_  
 Total Capital Gains \_\_\_\_\_  
 Total Capital Losses \_\_\_\_\_  
 Last Year's Tax Bracket \_\_\_\_\_

(continued on the other side)

## 2026 Basic Tax Planning Guide

### IRA/Roth Cont. Limit

Under age 50: \$7,500  
Age 50 & over: \$8,600

### Qualified Plan Cont. Limit

401k, 403b, 457: \$24,500  
Age 50-59 and 64 and over: \$32,500  
Age 60-63: \$35,750

### Roth IRA Phaseout

MFJ: \$242,000 - \$252,000  
MFS: \$0 - \$10,000  
Single: \$153,000 - \$168,000

### HSA Cont. Limit

Self-only coverage: \$4,400  
Family coverage: \$8,750

### Phaseout for IRA Deductions\*

MFJ: \$129,000 - \$149,000  
MFJ\*\*: \$242,000 - \$252,000  
MFS: \$0 - \$10,000  
Single: \$81,000 - \$91,000

### Standard Deduction

MFJ: \$32,200  
MFS: \$16,100  
Single: \$16,100

#### Notes:

MFJ = Married Filing Jointly, MFS = Married Filing Separate

Phaseout limits are based on Modified Adjusted Gross Income (MAGI)

\*Phaseout only applies to those who are participants in a qualified plan

\*\*IRA contributor isn't a participant in a qualified plan, but their spouse is

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