# What to Bring

**tax year 2026** **www.hupptax.com**

HUPP TAX SERVICE

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# Please Bring: (please don't staple)

Name: _____

- ☐ **Anything marked "Important Tax Document"**
- ☐ **W2s, 1099s, etc.** (showing income)
- ☐ **1098s & 1099s** (showing deductions, payments, etc.)
- ☐ **1098-T for students.** (REQUIRED for education credits)
- ☐ **1095-A** (Heatlhcare.gov/ACA/Obamacare/Marketplace)
- ☐ **Prior year tax return** (if not prepared by Hupp Tax)

**Changes during 2026:**

Moved (when?) _____

Moved (where?)_____

Did you get (circle) : Married / Divorced / Separated?

If so, when? _____

New Dependent? Include name, relation, DOB & SSN

## Some Key Changes for tax year 2026 (not all inclusive)

- Charitable monetary donations deductible in addition to standard deduction. Up to $1000 Single/$2000 Joint.
- Mortgage insurance premiums (PMI) are back! Deductible if you itemize (Schedule A).
- Ohio income tax rate is now a flat rate of 2.75% on taxable non-business income over $26,050.

☐ **Are you a US Citizen or lawfully authorized to work in the US?** **Yes** **No**

If not a US Citizen, are you a "qualified alien"? (needed for refundable credits) **Yes** No

☐ **Quarterly Estimates** (please specify if any amounts below were applied from prior year)

| | Quarter 1 | Quarter 2 | Quarter 3 | Quarter 4 | **Total** |
|---|---|---|---|---|---|
| Federal payments | | | | | $ |
| Ohio payments | | | | | $ |
| City (RITA, CCA, Geneva, etc) | | | | | $ |

☐ **Digital Assets** - Did you receive, sell, or exchange any digital assets? Yes No

If yes, include all 1099-DAs and related cost basis info for digital asset transactions.

☐ **Self-Employed** - summarize income & expenses (see enclosed worksheet or hupptax.com)

☐ **Rental Property -** summarize income & expenses (see enclosed worksheet or hupptax.com)

## Common Tax Breaks - (continued on back)

| | |
|---|---|
| ☐ **College Tuition** - The student's 1098-T is REQUIRED. | |
| Other required educational fees and books | $ |

| | |
|---|---|
| ☐ **Ohio tax breaks** (not all inclusive): | |
| 529 plan contributions. Include list with the amount for each beneficiary. Limit $4000 per beneficiary per year. | |
| Scholarship Granting Organization (SGO) Credit up to $750/spouse (see list of SGOs at hupptax.com/resources-links) | |
| Homeschool expenses credit up to $250 per student (books, etc. NO electronics) | $ |

## Common Tax Breaks (continued)

☐ **Health Savings Accounts** (HSA) - Please include the 1099-SA.

| | |
|---|---|
| Amount contributed (max. $4,400 Single, $8,750 family, add'l $1,000 catch up if over 55) | $ |
| Was any HSA distribution NOT used for qualified medical expenses? | non-medical amount $ |

☐ **IRA contributions -** max. $7,500 ($8,600 if > 50)

| | Owner | Amount | Owner | Amount |
|---|---|---|---|---|
| Traditional | | $ | | $ |
| Roth | | $ | | $ |

☐ **Child & Dependent Care Credit -** Expenses paid for day care in order to work or attend school

| | |
|---|---|
| Provider Tax ID, Name & address: | |
| Amount spent per child: Child name _____ Amount $_____ | |

☐ **Medical Expenses** - Total expense must be over 7.5% of AGI before any deduction.
****If medical exceeds 7.5%, it can help on the Ohio return, even if it doesn't on the Federal return.*

| | | |
|---|---|---|
| Health Ins. premiums (not through payroll) | | $ |
| Prescriptions | $ | |
| Dentists, Doctors | $ | |
| Hospitals, Labs | $ | |
| Long Term Care Insurance | $ | |
| Eyecare: Contacts, glasses | $ | |

| | | |
|---|---|---|
| Other | | $ |
| Other | | $ |
| Miles driven for medical | | |

## Itemized Deductions - Itemizing will help if deductions are more than your standard deduction.

******Note, with the higher SALT cap of $40,400 some might now benefit from itemizing deductions.******

**Standard deduction amounts: Single $16,100 Married $32,200, Head of Household $24,150**

*- additional standard deduction of $2,050 (single, HOH) or $1,650 (MFJ) if 65+ years and/or blind.*
*- extra $6,000 "senior" deduction for ages 65+ (phase out begins at $75,000 Single, $150,000 Joint. $0 if MFS)*

☐ **Mortgage Interest & Property Taxes**

| Please note amount paid (unless already included on form 1098.) | Interest | Property Taxes |
|---|---|---|
| | $ | $ |

☐ **Charitable donations -** IRS requires receipts for ALL donations

**Cash/Check Donations**

| | |
|---|---|
| Church | $ |
| Other | $ |
| Other | $ |

**Non-Cash Donations** *

| | | |
|---|---|---|
| Goodwill | | $ |
| Purple Heart | | $ |
| Other | | $ |

* If over $500, additional detail required; itemized list, value, etc

☐ **Gambling losses** - *new rule for '26 - deduction is lesser of gambling winnings or 90% of losses* $