Client & Family Information

2026 Tax Organizer · Form GTP-1

How to use this form

1. Open it on your phone or computer (iPhone: Files app or Adobe Acrobat Reader; Android: Google Drive or Acrobat).
2. Tap a box to type. Save the file. Every amount should come from a real record: receipt, invoice, bank or card statement.
3. Upload it with your documents through your secure account at www.gtaxplanners.com.

Never write full Social Security numbers or bank account numbers on this form. Upload ID copies securely instead.

1. You (taxpayer)

First name, middle initial | Last name | Date of birth (MM/DD/YYYY)

Occupation | Mobile phone | Email

Street address and apt. no. | City | State | ZIP code

Did you live at this address all of 2026? ☐ Yes ☐ No — I moved

2. Spouse (if married)

Spouse first name, middle initial | Spouse last name | Spouse date of birth

Spouse occupation | Spouse mobile phone | Spouse email

3. Marital status on December 31, 2026

☐ Single ☐ Married ☐ Divorced or legally separated ☐ Widowed (year: below)

If married, divorced or widowed in 2026, date of the change | Year spouse died (if widowed)

If married: file ☐ Jointly ☐ Separately ☐ Not sure — let's discuss

4. Dependents (children and other people you support)

List each person. Months lived with you = number of months in 2026 they lived in your home (12 if all year).

First and last name	Date of birth	Relationship to you	Months lived with you	Full-time student	Has a disability	Has own income
				☐	☐	☐
				☐	☐	☐
				☐	☐	☐
				☐	☐	☐
				☐	☐	☐
				☐	☐	☐

5. 2026 questions

Did you or your spouse work as an employee (Form W-2)?	☐ Yes	☐ No
Did you do gig, contract or self-employed work, or run a business? (Also fill out Form GTP-2.)	☐ Yes	☐ No
Did you receive a Form 1099-K from a payment app or online platform?	☐ Yes	☐ No
Did you own a rental property? (Also fill out Form GTP-4 for each property.)	☐ Yes	☐ No
Did you buy, sell or fix up any house or land in 2026? (Also fill out Form GTP-5.)	☐ Yes	☐ No
Did you sell stocks, crypto or other investments?	☐ Yes	☐ No
Did you have health insurance from the Marketplace (Form 1095-A)?	☐ Yes	☐ No
Did you pay for child care or college/school costs? (Also fill out Form GTP-6.)	☐ Yes	☐ No
Did you receive Social Security, unemployment, a pension or retirement distributions?	☐ Yes	☐ No
Did you make estimated tax payments to the IRS or a state for 2026?	☐ Yes	☐ No
Did you receive any letter from the IRS or a state tax agency in 2026?	☐ Yes	☐ No
Did you have a bank or investment account outside the United States?	☐ Yes	☐ No
Was 2026 a year with a big life change (marriage, divorce, new baby, death in the family, new home)?	☐ Yes	☐ No

6. Refund or payment

If you get a refund: ☐ Direct deposit ☐ Apply to 2027 tax ☐ No bank account - let's discuss

The IRS now sends refunds by direct deposit. Upload a voided check or a bank letter securely. Do not write account numbers here.

7. Anything else we should know

Notes (new jobs, unusual income, questions for us)

Your confirmation

I confirm that the information on this form is true and complete to the best of my knowledge, and that every amount comes from my own records, not from estimates. I will keep those records and give copies to G Tax Planners on request.

Your name

Your signature (type your full name)

Date

Spouse name (if filing jointly)

Spouse signature

Spouse date