BLAIR TAX CONSULTING, LLC

4325 21st Lane
Vero Beach, FL. 32966-1947
e-mail: info@blairtax.com

Telephone:
772-562-2348

5 EASY STEPS TO HELP US PREPARE YOU FOR THE APPROACHING TAX SEASON

1. Your account must be current through December 31, 2026 and we must have a completed Organizer on file before we can release your tax package. If this presents a problem, call and we'll do our best to work with you.

2. Hold your Organizer until you have all of the forms you are expecting from banks, employers, contractors, etc., then send everything to us all at one time. **Be sure to make copies of your income statements and send the originals to us.**

3. The LLC Partnership IRS filing deadline is March 15th. We will need everything in our office by no later than March 1st in order to meet this deadline.

4. Please do not place receipts for 2026 and 2027 in the same envelope. Mixing receipts will only delay your tax package.

5. If you have sub-contractors that will need a 1099 from you, supply us with the following information by no later than January 15, 2027: Contractor's name, social security number, address, and amount paid.

If you should have questions about any of the above or the Organizer, please don't hesitate to call.

BTC

BLAIR TAX CONSULTING, LLC

2026 Tax Organizer

You must complete and return this Organizer to our office before your tax return can be compiled.

Taxpayer's Name: _____

Spouse's Name: _____

Address for Tax Return: **(Number, City, State, Zip)**

_____

_____

_____

County of residence:_____

Phone and Driver License Numbers:

Home: _____

Cell: _____

Email: _____

D/L #: _____

(Required on many state tax returns)

Please complete the Tax Organizer in its entirety, and include it with all copies of your W-2's, 1099's, etc. We cannot compile your tax return without a completed Tax Organizer.

We suggest that you either scan or make copies of all your income statements such as (W-2/1099's) then mail us the originals.

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Filling Method: (Only one method may be selected.)

Single ☐ Married Filing Jointly ☐ Married Filling Separate ☐ Head Of Household ☐

Age of Taxpayer on December 31st: _____

Age of Spouse on December 31st: _____

	Taxpayer	**Spouse**
Social Security Number:	_____	_____
Occupation:	_____	_____
Date Of Birth: (Required on many State returns.)	_____	_____

Children and other Dependents: (If you need more room, please use back.)

	1	2	3	4
Full Name:	_____	_____	_____	_____
Date of Birth:	_____	_____	_____	_____
Social Security Number:	_____	_____	_____	_____
Relationship:	_____	_____	_____	_____

Contributions to individual retirement accounts:

Taxpayer's IRA: $ _____ Spouse's IRA: $ _____

Taxpayer's SEP: $ _____ Spouse's SEP: $ _____

Please answer the following questions :

Are you incorporated? ---------- Yes ☐ No ☐

Where there any births, deaths, adoptions, marriages, or divorces in your *immediate family* during the year? ---------- Yes ☐ No ☐

Did you sell or purchase any real estate during the year? If yes, please include the closing statement and form 1099S. ---------- Yes ☐ No ☐

Did you sell any stocks, bonds, or other property during the year? If yes, include Form 1099B statement from your broker. ---------- Yes ☐ No ☐

Did you pay for the care of one or more persons to enable you to work during the year? (Daycare.) If "yes", please call BTC for details. ---------- Yes ☐ No ☐

Are you a military veteran? ---------- Yes ☐ No ☐

Did you make any federal or State estimated tax payments for 2025? (Please note which is Federal and which is State.)

Federal or State	Amount	Federal or State	Amount

NOTE:

Your fee payment is for bookkeeping services. Since we are providing the tax package free of charge, the "Paid Preparer" section of your return is not signed. This is of no consequence as we stand behind your tax return 100%.