Life Events Checklist

Did any of these happen in 2026? Each one can change your return. Tell us early.

WHAT HAPPENED	HAPPENED?	WHEN
Got married or registered as domestic partners We'll need: Your spouse's details and the date.	Choose	
Divorced or separated We'll need: The judgment or agreement, and who claims the children.	Choose	
Had or adopted a child We'll need: The child's name and date of birth, and adoption costs.	Choose	
A death in the family We'll need: Death certificate, estate or trust documents, inherited account statements.	Choose	
Bought a home We'll need: The closing statement and your first mortgage statement.	Choose	
Sold a home or other property We'll need: The closing statement and what you paid for it, plus improvements.	Choose	
Moved to or from another state We'll need: Your move date. Use our California move checklist.	Choose	
Started a business or side income We'll need: What it does, when it started, income and costs so far.	Choose	
Closed or sold a business We'll need: The sale agreement and final statements.	Choose	
Changed jobs, lost a job, or retired We'll need: Every W-2, any severance, and 401(k) rollover papers.	Choose	
Received an inheritance or large gift We'll need: Statements showing the value on the date received.	Choose	
Gave a large gift We'll need: Who, what, and how much. A gift tax return may be due.	Choose	
Started paying for college We'll need: Form 1098-T and receipts for books and fees.	Choose	
Started Social Security or Medicare We'll need: Form SSA-1099 and Medicare premium notices.	Choose	
Received a large bonus, stock award, or option exercise We'll need: Grant and vesting statements from your employer.	Choose	
Opened an account or bought property outside the U.S. We'll need: The account's highest balance this year.	Choose	
Had a fire, flood, or theft loss We'll need: Use our casualty loss worksheet.	Choose	

This worksheet organizes your records so we can prepare your return. It is not tax advice and it is not a tax return.

Life Events Checklist

Life events, continued.

WHAT HAPPENED	HAPPENED?	WHEN
Got a letter from the IRS or FTB We'll need: Send every page, and use our notice checklist.	Choose	

Anything else we should know