

2026 Form W-4 Completion Checklist

Companion checklist - not an IRS form and not a substitute for the official Form W-4

- ☐ Download the current 2026 Form W-4 from [IRS.gov](https://www.irs.gov).
- ☐ Complete Step 1 with your personal information and filing status.
- ☐ Review Step 2 if you have multiple jobs or a working spouse.
- ☐ Review Step 3 for qualifying children, other dependents, and other credits.
- ☐ Use Step 4 only if you need other income, deductions, or extra withholding adjustments.
- ☐ If claiming exemption, verify you meet BOTH IRS conditions for 2026.
- ☐ Sign and date Step 5. An unsigned Form W-4 is not valid.
- ☐ Give the completed Form W-4 to your employer - do not mail it to the IRS.
- ☐ Revisit withholding after major personal or financial changes.
- ☐ Use the IRS Tax Withholding Estimator when you need a more precise mid-year update.

Official source: [IRS.gov/FormW4](https://www.irs.gov/FormW4)

This checklist is informational. Follow the official form instructions and seek tax advice when appropriate.