

InorOut

TAX SERVICES

3828 SE Division St.
Portland, OR 97202
503.239.0659

What to Bring?

All Organizers/worksheets are available on our website at www.inorouttax.com, under the “Helpful Worksheets” tab

New Clients:

- 2016 tax return

All Clients:

- Customer Information Sheet
- Drivers License or ID card

Tax Documents:

- W2
- 1099 R
- Unemployment
- W2G (also bring gambling loss information)
- 1099 INT/1099 DIV/1099 B investment (non-IRA) income and losses
- K-1 (Partnership/S-corp or Trust)
- Student Loan Interest
- IRA contributions (NOT contributed as an employee)
- 1095 A, B and/or C forms (months of healthcare coverage)

Own your own home?

- Mortgage interest
- Property tax
- Closing papers (if you bought or refinanced in 2016)

Itemized Deductions

- Out of Pocket Medical expenses
 - This includes copays, prescriptions, dental, vision and premiums (if NOT pre-tax through employer)
 - Please provide totals only—we do not need to see receipts
- Medical miles driven
- Portland Arts Tax or other City / County taxes - amounts paid in 2016
- Charitable donations by cash/check, Charitable donations of goods

Did you purchase your healthcare through Healthcare.gov?

- 1095-A form

Education expenses—is someone on the tax return in College/Graduate school?

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- 1098T Tuition expense form
- cost of books and supplies (first four years of a Bachelor's degree only)

Did you have childcare costs? (Generally, all parents on the tax return must work/have earned income to receive this credit)

- Name, Address and **TAX ID** of each child care provider
- Amount paid to each provider

Did you move more than 50 miles?

- Location you moved from
- Cost to pack and transport goods
- Hotel costs
- Rental truck fuel costs
- Mileage for each personal vehicle driven
- Cost of one plane ticket per person
- Cost to transport pets

Are you self-employed?

- Income and expense information
 - If your business is an S-corp, Partnership, Multi-member LLC or LLC taxed as a corporation, fill out the LLC/S-Corp Partnership Organizer or provide the equivalent information
 - For Sole Proprietors or Single Owner LLC's not taxed as a corporation, fill out the Self Employment organizer or provide information in an equivalent format, with each expense category totaled.
 - for EQUIPMENT, please provide date purchased, description and amount paid
 - for TRAVEL, please provide cities traveled to and number of days there
 - If you maintain INVENTORY, please provide starting (new clients) and ending inventory along with inventory purchased in 2016.
- Home office organizer (if applicable)
- Auto mileage/expense organizer (if applicable)

Do you own Rental Property or run an Air B and B?

- Rental income and expenses (use the rental organizer or provide the equivalent information)
 - Please clearly mark rental property tax and mortgage interest as "Rental"
 - For IMPROVEMENTS, please provide the date of completion, cost and a description
- closing papers (new customers/new rentals or if you refinanced in 2016 only)
 - if you cannot provide closing papers, we will need purchase date and purchase price information as well as rental start date