

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:

- 2019 tax return

All Clients:

- Customer Information Sheet
- Drivers License or ID card
- Signed Engagement Letter
- Recovery Rebate Credit Amounts

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, if you have ever refinanced we need to see closing papers
- Property tax
- Closing papers (if you bought or refinanced in 2020)

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 2020
- Charitable donations by cash/check, charitable donations of goods

Did you purchase your healthcare through Healthcare.gov?

- 1095-A form

InorOut

TAX SERVICES

3828 SE Division St.
Portland, OR 97202
503.239.0659

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

- 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 or be a full time student to receive this credit)

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

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. Do not also do the Sole Proprietor worksheet for the same business.
 - 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. Do not also do the S-Corp, LLC worksheet for the same business.
 - 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 2020.
- 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 2020 only)
 - if you cannot provide closing papers, we will need purchase date and purchase price information as well as rental start date