

# 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](http://www.inorouttax.com), under the “Helpful Worksheets” tab

#### New Clients:

- 2020 tax return

#### All Clients:

- Customer Information Sheet
- Drivers License or ID card
- Signed Engagement Letter

#### 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)
- Letter 6419 Advanced Child Tax Credit payments
- Letter 6475 Recovery Rebate Credit Amount

#### Own your own home?

- Form 1098, Mortgage interest. If you have ever refinanced, we need further details.
- Property tax
- Closing papers (if you bought or refinanced in 2021)

#### Itemized Deductions

- Out of Pocket Medical expenses
  - This includes copays, prescriptions, dental, vision, chiropractic, and premiums (If it is NOT pre-taxed 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 2021
- Charitable donations by cash/check, charitable donations of goods, and charitable miles driven.

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**Did you purchase your healthcare through Healthcare.gov? If yes, then**

1095-A form

**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 childcare 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. The Sole Proprietor worksheet is not necessary if the business organizer is required.

--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. If you are a Sole Proprietor or Single Owner LLC, the S-Corp/LLC worksheet is not required.

--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 2021.

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 2021 only)

--if you cannot provide closing papers, we will need purchase date and purchase price information as well as rental start date