

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:

- 2021 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)

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 2022)

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 2022
- 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 2022 only)

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