

InorOut

TAX SERVICES

3828 SE Division St.
Portland, OR 97202
503.239.0659

What to Bring?

Please open all envelopes and lay our documents flat, also, do not attach receipts for anything!

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

New Clients:

- 2022 tax return

All Clients:

- Customer Information Sheet
- Drivers License or ID card
- Signed Engagement Letter
- Deposit (minimum \$400)

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 if you purchased health insurance on healthcare.gov

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 2023)

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 and subtotal between spouses in married filing jointly.
- Medical miles driven
- Portland Arts Tax or other City / County taxes - amounts paid in 2023.
- Charitable donations by cash/check, charitable donations of goods, and charitable miles driven. Please provide a total for all cash donations and a fair

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market value total for all goods donated. We do not need copies of receipts.

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

1095-A form(s)

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 2023.

Home office organizer (if applicable)

Auto mileage/expense organizer (if applicable)

Do you own Rental Property, rent out a room (or rooms) in your home or run an Air BnB?

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 2023 only)

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