InorOut
TAX SERVICES
3828 SE Division St.
Portland, OR 97202
503.239.0659

# What to Bring?

**Please open all envelopes and lay your 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**:
- ☐ Previous year's tax return

**All Clients:**
- ☐ Customer Information Sheet
- ☐ Driver's License or ID card
- ☐ Signed Engagement Letter

**Tax Documents**:
- ☐ W2 (Wages)
- ☐ 1099 R (Retirement)
- ☐ Unemployment (1099 G)
- ☐ Gambling Winnings (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/fiduciary)
- ☐ Social Security 1099
- ☐ Student Loan Interest
- ☐ IRA contributions (NOT contributed as an employee)
- ☐ 1095 A if you purchased health insurance on healthcare.gov

**Receive Tip Income?**
- ☐ Employees—provide a tip log for any tips in excess of what is reported on your W2
- ☐ Self Employed—provide 1099-K or 1099-NEC showing tips received or provide a tip log

**Received Overtime Pay**
- ☐ Provide a copy of your final paystub for 2025

**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 2025)

**Itemized Deductions**
- ☐ Out of Pocket Medical expenses
  --This includes copays, prescriptions, dental, vision, chiropractic,

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and premiums (If it is NOT pre-taxed through employer)
--Please provide separate out of pocket totals for the medical costs for each person on the tax return
--Please DO NOT include receipts—keep them for your records

☐ Medical miles driven
☐ Portland Arts Tax or other City / County taxes - amounts paid in 2025.
☐ Charitable donations of cash. Please provide a total
☐ Charitable donations of goods. Please provide the total fair market value of items donated and estimated amount of original value of goods, list by individual places you donated to for the year
☐ Charitable miles driven. Please provide a total

**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)
☐ 1099 Q if College Savings plan (529 plan or education IRA) funds were used to cover school costs

**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)**

☐ Fill out a childcare worksheet or provide the 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 in each city
--If you maintain INVENTORY, please provide starting (new clients) and ending inventory along with inventory purchased in 2025.

☐ Home office organizer (if applicable)

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☐ Auto mileage/expense organizer (if applicable)

**Do you own Rental Property 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 2025 only)

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