



Name \_\_\_\_\_

## 2018 TAX ORGANIZER

### INCOME

Please check the kind of income you received or got notice of

- |   |  |
|---|--|
| <input type="checkbox"/> Salary or wages: # of W-2's                | <input type="checkbox"/> Tips not reported to your employer    |
| <input type="checkbox"/> Taxable interest income _____              | <input type="checkbox"/> Tax exempt interest                   |
| <input type="checkbox"/> Dividends on 1099s                         | <input type="checkbox"/> Pensions or annuities-taxable         |
| <input type="checkbox"/> State tax refund _____                     | <input type="checkbox"/> Pensions or annuities-nontaxable      |
| <input type="checkbox"/> Social security/ Railroad retirement       | <input type="checkbox"/> IRA, SEP or KEOGH distributions       |
| <input type="checkbox"/> Business Income                            | <input type="checkbox"/> Military pay                          |
| <input type="checkbox"/> Farm Income                                | <input type="checkbox"/> Veteran's benefits                    |
| <input type="checkbox"/> Rental Income                              | <input type="checkbox"/> Barter/Trade Income                   |
| <input type="checkbox"/> Royalty Income                             | <input type="checkbox"/> Unemployment income                   |
| <input type="checkbox"/> Sale of Stocks, Bonds, or other securities | <input type="checkbox"/> Worker's Comp/Sick Pay/Disability     |
| <input type="checkbox"/> Sale of Real Estate                        | <input type="checkbox"/> Lump sum payments from a pension plan |
| <input type="checkbox"/> Partnership, Estate or Trust Income        | <input type="checkbox"/> Gambling or Lottery winnings          |
| <input type="checkbox"/> Installment sales- this year               | <input type="checkbox"/> Scholarship or grant                  |
| <input type="checkbox"/> Installment sales- prior years             | <input type="checkbox"/> Cancellation of debt or mortgage      |
| <input type="checkbox"/> Inheritance/ Gifts over \$15,000           | <input type="checkbox"/> Jury Duty                             |
| <input type="checkbox"/> Alimony received                           |  |

### ESTIMATED PAYMENTS MADE TOWARD YOUR LAST YEAR'S TAXES

Estimate	Federal \$\$	Date paid	State \$\$	Date paid
Last Year 4th Q				
1st Quarter				
2nd Quarter				
3rd Quarter				
4th Quarter				

- Do you want direct deposit of your refund?  Yes  No
- Do you want to pay your taxes electronically?  Yes  No
- If you owe, do you want an installment agreement?  Yes  No

Name of Bank \_\_\_\_\_ Routing # \_\_\_\_\_

Acct # \_\_\_\_\_  Checking  Savings

- Are you paying back a 1<sup>st</sup> Time Home Buyer Credit?  Yes  No
- Do you have a foreign bank account or own foreign property?  Yes  No
- Do you have virtual currency (Bitcoin, Litecoin, Dogecoin or other)?  Yes  No

MEDICAL EXPENSES

Prescription medicine and drugs \$ \_\_\_\_\_
Doctors, Dentists, Hospitals \$ \_\_\_\_\_
Health/Dental/Vision premiums \$ \_\_\_\_\_
Self Employed [ ] Yes [ ] No
Long Term Care Premiums \$ \_\_\_\_\_
Other (eyeglasses, hearing aids) \$ \_\_\_\_\_
Medical Miles (# of miles) \_\_\_\_\_
HDHP/HSA Accounts \$ \_\_\_\_\_

STATE AND LOCAL TAXES

Property taxes on your home \$ \_\_\_\_\_
Portland Art Tax Paid \$ \_\_\_\_\_

INTEREST EXPENSE

Home Mortgage interest \$ \_\_\_\_\_
Second Mortgage / Line of Credit \$ \_\_\_\_\_
Second home interest \$ \_\_\_\_\_

(Trailer, Motor Home, Houseboat)

Mortgage Insurance \$ \_\_\_\_\_
Investment Interest \$ \_\_\_\_\_

OTHER

Expenses of reservists, performing artists, and fee-basis government officials \$ \_\_\_\_\_
Moving Expenses for members of the Armed Forces \$ \_\_\_\_\_

Alimony income received or alimony paid \$ \_\_\_\_\_
Individual who received/paid alimony - Social Security # \_\_\_\_\_
Date of when the spousal agreement was put in place \_\_\_\_\_

Self Employed retirement contributions [ ] SEP IRA [ ] SIMPLE IRA [ ] 401K \$ \_\_\_\_\_

Individual Retirement Contributions [ ] Traditional IRA [ ] ROTH IRA
You \$ \_\_\_\_\_ Spouse \$ \_\_\_\_\_

Energy Efficient Home Improvements \$ \_\_\_\_\_

OREGON

Did you contribute to a 529 plan this year? [ ] Yes [ ] No Contribution amount \$ \_\_\_\_\_
Political Contributions \$ \_\_\_\_\_ Oregon Cultural Trust Contributions \$ \_\_\_\_\_

OTHER TAX MATTERS (Check any that apply)

- \_\_\_ Did you receive letters from the IRS or state tax agency this year? (bring letters)
\_\_\_ Did you refinance your home? Buy a new home? Sell your home?
\_\_\_ Blind or disabled?
\_\_\_ Use convertible virtual currency (like Bitcoin) to pay for goods or services in a real-world transaction?

\*Please supply all tax documents such as W-2s, 1099s, 1098s, K-1s, property tax and closing statements.

CONTRIBUTIONS

Contributions (cash or check) \$ \_\_\_\_\_
(You must have receipt for all contributions)
Volunteer miles \_\_\_\_\_
Volunteer expenses \$ \_\_\_\_\_
Non-Cash Contributions \$ \_\_\_\_\_
(Over \$500 please itemize on a separate sheet)
(Provide Form 1098-C for vehicles)

MISCELLANEOUS EXPENSES

Educator Expenses paid \$ \_\_\_\_\_
Tax Preparation \$ \_\_\_\_\_
Student Loan Interest \$ \_\_\_\_\_
Tuition and Fees \$ \_\_\_\_\_
Additional College Costs \$ \_\_\_\_\_

Did you have Health Insurance? [ ] Yes [ ] No

Did you receive a Form 1095? [ ] Yes [ ] No