



TAX PRO

Name: _____

2021 TAX ORGANIZER

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 | <input type="checkbox"/> Virtual Currency received, sold, sent, exchanged |

ESTIMATED PAYMENTS MADE TOWARD YOUR LAST YEAR'S TAXES

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

Do you want direct deposit of your refund? Yes No

Do you want to pay your taxes electronically? Yes No

Name of Bank _____ Routing # _____

Acct # _____ Checking Savings

Are you paying back a 1st 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

Did you receive advanced Child Tax Credit? Yes No

Did you Receive an Economic Impact Payment? (Stimulus Check)

If so, How much? _____

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.

*If you were affected by COVID-19, received a PPP or EIDL Loan, please make sure we know exactly how you were affected.

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 \$ _____