



TAX PRO

Name: \_\_\_\_\_

## 2022 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 \$16,000           | <input type="checkbox"/> Jury Duty                                      |
| <input type="checkbox"/> Alimony received                           | <input type="checkbox"/> Digital Assets received, sold, sent, exchanged |

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

Estimate	Federal \$\$	Date paid	State \$\$	Date paid
Last Year 4 <sup>th</sup> Q				
1 <sup>st</sup> Quarter				
2 <sup>nd</sup> Quarter				
3 <sup>rd</sup> Quarter				
4 <sup>th</sup> 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 1<sup>st</sup> Time Home Buyer Credit?  Yes  No

Do you have a foreign bank account or own foreign property?  Yes  No

At any time during 2022, did you:

(a) receive (as a reward, award, or payment for property or services);

(b) sell, exchange, gift, or otherwise dispose of a digital asset

(or a financial interest in a digital asset)?  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 \$ \_\_\_\_\_
Form 1095-A Received? [ ] Yes [ ] No

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)

STATE AND LOCAL TAXES

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

MISCELLANEOUS EXPENSES

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

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 digital assets (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.