



TAX PRO

Name: _____

2023 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 \$17,000 | <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 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

At any time during 2023, 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

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 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.

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 \$ _____