

**2013 TAX ORGANIZER & DEDUCTION FINDER**

**(BOLD is new for 2013)**

Taxpayer \_\_\_\_\_

A. THINGS TO BRING TO YOUR APPOINTMENT

sign

print

- W-2 (wages)
- 1099-INT (interest income), 1099-DIV (dividend income) sign print
- Any Foreign Investment Accounts? Foreign Assets or Real Estate? (your **WORLDWIDE** income)
- 1099-B (sale of securities or mutual funds), **ALSO** need purchase date and cost (or basis)
- 1099-R (IRA/Keogh or other retirement plan withdrawals) Repay PERS?
- 1099-G (unemployment compensation)
- 1099-MISC (commissions, fees, etc.)
- Business income and expenses, Did you start or end a business? Receive form 1099-K?
- SSA-1099 (social security compensation), Other 1099 forms
- K-1 (partnerships, estates, trusts, etc.)
- FINAL closing statement if you refinanced, bought or sold your home
- 1098-Mortgage Interest, And real estate taxes paid
- Record of estimate tax payments (or canceled checks) with date paid

B. QUESTIONS ("you" means you or your spouse)

Check one or more:  On Dec.31<sup>st</sup>, were you not married (never married or legally divorced)?

Are you married?  Are you a widow(er)  Are you considering a divorce?

Are you a Registered Oregon Domestic Partner

- Any change in your marital status, dependents, address, or telephone number?
- Anyone else living in your home, or address, or you support? List their name and birth date

- If married, do either taxpayer or spouse, choose to file a separate tax return?
- Did you have any children under age 18 on December 31st, or full-time students under age 24, with interest and dividend income in excess of **\$1000**, or total investment income in excess of **\$2000**?
- Did you, or do you plan on contributing to an IRA, ROTH, SEP, Keogh, SIMPLE, or Coverdell plan?
- Did you have a retirement plan withdrawal, rollover, conversion or lump sum distribution?
- Have you ever made a **NONDEDUCTABLE** contribution to your traditional IRA?
- Did you incur any education tuition, course books and materials or loan interest? Form 1098-T
- Did you sell, exchange or rollover any stock, mutual fund, or other investments or assets?
- Did you receive or pay any alimony? Divorce papers needed.
- Did you pay childcare expenses? Provider name, address, EIN, phone number
- Did you receive any tips or gratuities?
- Did you travel between more than one job location or travel to a temporary work location?
- Did you make loan payments on a boat or RV that has basic living accommodations?
- Do you have any forgiven income? Did you file or plan to file for bankruptcy?
- Do you have any self-employment or business income?
- Do you have rent income?
- Does your employer have an incentive stock option or stock purchase plan?
- Do you buy or sell call or put options? Trade on the foreign exchange?
- Do you have any other income? (Jury duty, "under the table", prizes, awards, etc.)
- Did you receive any correspondence from IRS or Oregon Department of Revenue?
- Did you gift \$14,000 or more to someone?
- Make any energy savings improvements to your home?
- Did you employ an individual to perform household services in your home?
- Did you receive a credit of \$7500 from a home purchased in 2008?
- Do you want a Direct Deposit of your refund? (need - voided check or bank info on file)
- Do you have health insurance?
- Do you have an Identity Protection PIN from IRS?

C. INCOME

- Wages
- Interest, Dividends, including tax exempt
- Municipal Bonds
- Installment sale payments received
- Retirement plan distributions, disability income
- Rent, tenants' deposits that you are keeping

- Social Security Benefits or Railroad Retirement Benefits
- Bartering, sales on the Internet
- Any other income

D. DEDUCTIONS

E. Medical Expenses

**(MAY NEED EXPENSES FOR EACH PERSON, SEPERATELY)**

(Do not include any amounts paid for or reimbursed by medical insurance.)

(Do not include insurance premiums paid with pre-tax income.)

- Hospitalization and Health insurance premiums
- Long term care insurance premiums
- Dental or contact lens insurance
- Prescribed drugs and insulin
- Doctor, Clinic or Hospital fees
- Dentists, Orthodontists fees, Glasses, contacts and eye examinations
- Nurses, ambulance, Alcoholism treatment
- Smoke-ending programs and prescription anti-smoking aids
- Nursing or retirement home (medical care only)
- Medical transportation, medical miles, parking
- Medicare Insurance paid outside of Social Security Benefits

Other Taxes

- State income taxes, State sales taxes
- Real estate tax, (including deferred taxes), interest charges, casualty loss
- Did you pay the Portland Arts Tax?**

Interest Paid (on primary and 2<sup>nd</sup> residence)

- 1<sup>st</sup> mortgage, 2<sup>nd</sup> mortgage
- Home equity or home improvement loan
- Points amortization
- Are you paying for mortgage insurance premiums on a new contract?

Contributions-CASH (Receipt or canceled check, required)

- Church, Synagogues, United Way, Cancer, Heart, Scouts, MS, MD, ADA

Contributions-NONCASH (Good or better condition, only)

- Goodwill, Salvation Army, ARC
- Donation of a vehicle (Form 1098-C)
- Mileage (need log book)

MISCELLANEOUS

- Union dues and professional dues, professional licenses and fees
- Professional or work related subscriptions, journals, etc
- Tools/Supplies purchased for work, Safety equipment (helmets, shoes, gloves, etc)
- Special uniforms for job and their cleaning
- Business mileage - written record is needed, employer reimbursement
- Employment related schooling or seminars, tuition, books, parking
- Investment expenses
- Gambling losses, Job seeking expenses

F. Alternative Minimum Tax Issues (AMT)

- Mortgage interest that is not from buy, build or improve your non-mobile home
- Home Equity Loan, RV or Boat Loan
- Exercise incentive stock options
- Tax exempt interest from private activity bonds

G. OREGON ISSUES

- Are you or your dependents disabled? (IEP or IFSP)
- Did you contribute to an Oregon college savings plan? (Sec. 529)
- Did you make a political contribution?
- Are you 62 or older and have any medical deductions? **Need expenses for each person .**
- Did you purchase a premium-efficiency appliance?
- Would you like to make a charitable contribution (check-off) on your Oregon return?

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