tax minimizers OF OREGON INC
The Profit Planners

Bend: 541-548-1040
Gresham: 503-665-1040
Portland: 503-281-0919
Redmond: 541-923-1040

Individual Tax Organizer

This is just a guideline!

Even if you don't complete these worksheets, please bring them with you to your tax appointment.

DOES YOUR MONEY WORK AS HARD AS YOU DO?

Tax laws change every year. Even with no change in your financial situation, your taxes may vary greatly. Sound, professional advice is critical to minimizing your tax bill and keeping more money in your pocket.

How can we help? Our firm provides income tax return preparation for individuals, partnerships, corporations, trusts and estates. Unlike some firms that just "crunch your numbers," we recommend ways to reduce your tax liabilities and improve your overall financial picture, with your personal goals and objectives in mind.

Frequently, our recommendations more than offset the cost of our professional services.

Good tax planning, along with timely action, allows you to do more than prevent future problems. It allows you to seize opportunities and capitalize on your profits. You are guaranteed our personal attention, expertise and experience every step of the way.

Your professional should do more than prepare your tax return. Our firm can also analyze your return to help save you money.

We look forward to working with you, and your friends!

You Can Learn More at: *www.taxminimizers.com*
OBTP #B15756

547 NE Bellevue #108
Bend, OR 97701

333 SE 223rd #104
Gresham, OR 97030

3835 NE Hancock #101
Portland, OR 97212

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Redmond, OR 97756

ORGANIZER

2013	1040	US	Client Information	1

Tax Minimizers of Oregon Inc.
PO Box 1130
Gresham, OR 97030
Telephone number: (503) 665-1040
Fax number: (503) 907-6102
E-mail address: info@taxminimizers.com

Tax Return Appointment

Date:
Time:
Location:

This tax organizer will assist you in gathering information necessary for the preparation of your 2013 tax return. Please add, change, or delete information as appropriate.

CLIENT INFORMATION

Filing Status	Filing status (table)	2
	1=married filing separate and lived with spouse	
	Year spouse died, if qualifying widow(er) (2011 or 2012)	
Taxpayer	First name and initial	
	Last name	
	Title/suffix	
	Social security number	
	Occupation	
	Date of birth (m/d/y)	
	Date of death (m/d/y)	
	1=blind	
Spouse	First name and initial	
	Last name	
	Title/suffix	
	Social security number	
	Occupation	
	Date of birth (m/d/y)	
	Date of death (m/d/y)	
	1=blind	
Address	In care of	
	Street address	
	Apartment number	
	City	
	State	OR
	ZIP code	
Foreign Address	Region	
	Postal code	
	Country	

Filing Status

1 = Single
2 = Married filing joint
3 = Married filing separate
4 = Head of household
5 = Qualifying widow(er)

2013	1040	US/OR	Client Information (continued)	1 p2

Please add, change or delete information for 2013.

CLIENT INFORMATION

Taxpayer Contact Information	Home phone	
	Work phone	
	Work extension	
	Daytime phone (table)	1
	Mobile phone	
	Pager number	
	Fax number	
	E-mail address	
Spouse Contact Information	Home phone	
	Work phone	
	Work extension	
	Daytime phone (table)	1
	Mobile phone	
	Pager number	
	Fax number	
	E-mail address	
State Information	1=taxpayer disabled	
	1=spouse disabled	
	RDP filing status (table)	

Daytime Phone

1 = Work
2 = Home
3 = Mobile

2013	1040	US/OR	Dependents	2

Please add, change or delete information for 2013.

DEPENDENTS

	Dependent	Dependent
First name		
Last name		
Title/suffix		
Date of birth (m/d/y)		
Social security number		
Relationship		
Months lived at home		
Type of dependent (see table)		
Earned income credit (see table)		
Claimed by: 1=taxpayer, 2=spouse		
1=disabled		

	Dependent	Dependent
First name		
Last name		
Title/suffix		
Date of birth (m/d/y)		
Social security number		
Relationship		
Months lived at home		
Type of dependent (see table)		
Earned income credit (see table)		
Claimed by: 1=taxpayer, 2=spouse		
1=disabled		

	Dependent	Dependent
First name		
Last name		
Title/suffix		
Date of birth (m/d/y)		
Social security number		
Relationship		
Months lived at home		
Type of dependent (see table)		
Earned income credit (see table)		
Claimed by: 1=taxpayer, 2=spouse		
1=disabled		

	Dependent	Dependent
First name		
Last name		
Title/suffix		
Date of birth (m/d/y)		
Social security number		
Relationship		
Months lived at home		
Type of dependent (see table)		
Earned income credit (see table)		
Claimed by: 1=taxpayer, 2=spouse		
1=disabled		

Type of Dependent

1 = Child living w/taxpayer
2 = Child not living w/taxpayer
3 = Dependent other than child
4 = Head of household only, not a dependent
5 = Earned income credit only, not a dependent

Earned Income Credit

1 = When applicable (default)
2 = Student age 19 to 23
3 = Disabled
4 = Force
5 = Suppress

NOTE: If you claim the earned income credit, please provide proof that your child is a resident of the U.S. This proof is typically in the form of:

1. School records or statement
2. Landlord or property management statement
3. Health care provider statement
4. Medical records
5. Child care provider records
6. Placement agency statement
7. Social service records or statement
8. Place of worship statement
9. Indian tribe office statement
10. Employer statement

NOTE: If your child is disabled, please provide one of the following forms of proof of disability:

1. Doctor statement
2. Other health care provider statement
3. Social services agency or program statement

2013	1040	US/OR	Direct Deposit & Estimates (Form 1040 ES)	3, 6

Please enter all pertinent 2013 information.

DIRECT DEPOSIT / ELECTRONIC PAYMENT (3)

1=direct deposit of federal tax refund into bank account		
1=electronic payment of balance due		
1=electronic payment of estimated tax		
1=state direct deposit		

BANK INFORMATION

Name of Bank	Percent to Deposit (xx.xx)	Routing Number	Account Number	Type of Account (Table 1)	Type of Invest. (Table 2)

2013 ESTIMATED TAX / 1040-ES (6)

Federal

	Amount Paid	Date Paid	TS	2013 Voucher Amount
Overpayment applied from 2012				
1st quarter payment				
2nd quarter payment				
3rd quarter payment				
4th quarter payment				
Additional Estimated Tax Payments				
Paid with extension				

State

	Amount Paid	Date Paid	TS	2013 Voucher Amount
Overpayment applied from 2012				
1st quarter payment				
2nd quarter payment				
3rd quarter payment				
4th quarter payment				
Additional Estimated Tax Payments				
Paid with extension				

1 Type of Account

1 = Savings
2 = Checking

2 Type of Investment

1 = Checking or savings (default)
2 = Taxpayer's IRA (next year limits)
3 = Spouse's IRA (next year limits)
4 = Health savings account (HSA)
5 = Archer MSA
6 = Coverdell savings account (ESA)
7 = Other
8 = Taxpayer's IRA (current year limits)
9 = Spouse's IRA (current year limits)

2013	1040	US/OR	Direct Deposit & Estimates (Form 1040 ES) (cont.)	7.1

Please enter all pertinent 2013 information.

2013 ESTIMATED TAX / 1040-ES (6)

Multnomah

	Amount Paid	Date Paid	TS	${Y+01} Voucher Amount
Overpayment applied from 2012				
1st quarter payment				
2nd quarter payment				
3rd quarter payment				
4th quarter payment				
Paid with extension (not later than 4/15/14)	407	409		

Portland

	Amount Paid	Date Paid	TS	${Y+01} Voucher Amount
Overpayment applied from 2012				
1st quarter payment				
2nd quarter payment				
3rd quarter payment				
4th quarter payment				
Paid with extension (not later than 4/15/14)				

APPLICATION OF 2013 OVERPAYMENT (7.1)

If you have an overpayment of 2013 taxes, do you want the excess refunded? ☐ or applied to 2014 estimate? ☐

Other (please explain): ______

2014 ESTIMATED TAX INFORMATION

Do you expect your 2014 taxable income to be different from 2013? Yes ☐ No ☐

If "yes" explain any differences in income, deductions, dependents, etc.: ______

Do you expect your 2014 withholding to be different from 2013? Yes ☐ No ☐

If "yes" explain any differences: ______

2013	1040	US	Wages, Pensions, Gambling Winnings	10, 13.1, 13.2

Please enter all pertinent 2013 amounts & attach all W-2, W-2G and 1099-R forms.
Last year's amounts are provided for your reference.

WAGES, SALARIES, TIPS (10)

No.	Name of Employer (Box c)	1=retirement plan (Box 13)	1=spouse	Wages, Tips, Other Compensation (Box 1)	Tax Withheld Federal (Box 2)	Tax Withheld Social Security (Box 4)	Tax Withheld Medicare (Box 6)	Tax Withheld State (Box 17)	Tax Withheld Local (Box 19)	2012 Wages

PENSIONS, IRA DISTRIBUTIONS (13.1)

No.	Name of Payer	1=spouse	1=IRA/SEP/SIMPLE	Distribution code #1	Distribution code #2	Gross Distribution (Box 1)	Taxable Amount (Box 2a)	Tax Withheld Federal (Box 4)	Tax Withheld State (Box 12)	Value of all IRAs at 12/31/13	2012 Distribution

GAMBLING WINNINGS (W-2G) (13.2)

No.	Name of Payer	1=spouse	Gross Winnings (Box 1)	Tax Withheld Federal (Box 4)	Tax Withheld State (Box 15)	2012 Winnings

GAMBLING LOSSES & WINNINGS (NON W-2G) (13.2)

	2013 Amount	TS	2012 Amount
Total gambling losses			
Winnings not reported on Form W-2G			

(T=taxpayer, S=spouse, Blank=joint)

2013	1040	US	Interest & Dividend Income	11, 12

Please enter all pertinent 2013 amounts & attach all 1099-INT, 1099-OID and 1099-DIV forms.
Last year's amounts are provided for your reference.

INTEREST INCOME (11)

No.	Name of Payer (also enter SSN & address for seller-financed mortgage)	1=taxpayer 2=spouse	Interest Income: Banks, S&Ls, C/Us, etc. (Box 1)	Interest Income: Seller-Financed Mtg. (Box 1)	Interest Income: U.S. Bonds, T-Bills (Box 3)	Tax-Exempt Interest: Total Municipal Bonds	Tax-Exempt Interest: In-state Municipal Bonds	Early Withdrawal Penalty (Box 2)	2012 Interest

DIVIDEND INCOME (12)

No.	Name of Payer	1=tp 2=sp	Dividend Income: Total Ordinary Dividends (Box 1a)	Dividend Income: Qualified Dividends (Box 1b)	Dividend Income: Total Capital Gain Distrib. (Box 2a)	Dividend Income: U.S. Bonds (% or amt.)	Tax-Exempt Interest: Total Municipal Bonds	Tax-Exempt Interest: In-state Muni-bonds (% or amt.)	Foreign Tax Paid (Box 6)	2012 Dividends

2013	1040	US	Miscellaneous Income	14.1

Please enter all pertinent 2013 amounts and attach all 1099-MISC, SSA-1099, and RRB-1099 forms. Last year's amounts are provided for your reference.

MISCELLANEOUS INCOME

	2013 Amount		2012 Amount	
	Taxpayer	Spouse	Taxpayer	Spouse
Social security benefits (SSA-1099, box 5)				
Medicare premiums paid (SSA-1099)				
Tier 1 RR retirement benefits (RRB-1099, box 5)				
1=lump-sum election for SS benefits				
Alimony received				
Taxable scholarships and fellowships				
Jury duty pay				
Household employee income not on W-2				
Excess minister's allowance				
Alaska permanent fund dividends				
Income from rental of personal property				
Income subject to S/E tax:				
Other income (1099-MISC, box 3, 8)				

TAX WITHHELD (not entered elsewhere)

	2013 Taxpayer	2013 Spouse	2012 Taxpayer	2012 Spouse
Federal income tax withheld				
State income tax withheld				
Local income tax withheld				

Please enter all pertinent 2013 amounts and attach all 1098 forms.
Last year's amounts are provided for your reference.

MEDICAL AND DENTAL EXPENSES

NOTE: Enter self-employed health insurance premiums on Sheet 24 and Medicare insurance premiums on Sheet 14.

	2013 Amount	TS	2012 Amount
Prescription medicines and drugs			
Doctors, dentists and nurses			
Hospitals and nursing homes			
Insurance premiums not entered elsewhere (excl. LT care & amts. paid w/pre-tax dollars)			
Long-term care premiums - taxpayer			
Long-term care premiums - spouse			
Insurance reimbursement (enter as a positive number)			
Lodging and transportation:			
Out-of-pocket expenses			
Medical miles driven			
Other medical and dental expenses:			

TAXES PAID (State and local withholding and 2013 estimates are automatic.)

	2013 Amount	TS	2012 Amount
State income taxes - 1/13 payment on 2012 state estimate			
State income taxes - paid with 2012 state return extension			
State income taxes - paid with 2012 state return			
State income taxes - paid for prior years and/or to other state			
City/local income taxes - 1/13 payment on 2012 city/local estimate			
City/local income taxes - paid with 2012 city/local extension			
City/local income taxes - paid with 2012 city/local return			

SALES AND USE TAXES PAID

	2013 Amount	TS	2012 Amount
State and local sales taxes (except autos and special items)			
Use taxes paid on 2013 purchases			
Use taxes paid with 2012 state return			
Sales tax on autos not included above			
Sales tax on boats, aircraft, other special items			

OTHER TAXES PAID

	2013 Amount	TS	2012 Amount
Real estate taxes - principal residence:			
Real estate taxes - property held for investment			
Personal property taxes (including auto fees in some states. Provide a copy of tax notice)			
Foreign income taxes			
Other taxes:			

Please enter all pertinent 2013 amounts. Last year's amounts are provided for your reference.

INTEREST PAID

	2013 Amount	TS	2012 Amount
Home mortgage int. (Box 1) and points (Box 2) reported on Form 1098:			
Home mortgage interest not reported on Form 1098:			
Payee's name			
Payee's SSN or FEIN			
Payee's street address			
Payee's city			
Payee's state			
Payee's ZIP code			
Amount paid			
Points not reported on Form 1098:			
Mortgage insurance premiums on post 12/31/06 contracts (Box 4)			
Investment interest (interest on margin accounts):			
Passive interest			
Certain home mortgage interest included above (6251)			

NOTE: Points paid on loans other than to buy, build, or improve your main home are deductible over the life of the mortgage. For these types of loans also provide the dates and lives of the loans.

CASH CONTRIBUTIONS

NOTE: No deduction is allowed for cash or check contributions unless the donor maintains a bank record, or a written communication from the donee, showing the name of the organization, contribution date(s), and contribution amount(s).

Churches, schools, hospitals, and other charitable organizations (50% limitation):

Contributions by cash or check:	2013 Amount	TS	2012 Amount
Volunteer expenses (out-of-pocket)			
Number of charitable miles			

Veterans' organizations, fraternal societies, nonprofit cemeteries, and certain private nonoperating foundations (30% limitation):

Contributions by cash or check:	2013 Amount	TS	2012 Amount
Volunteer expenses (out-of-pocket)			
Number of charitable miles			

Please enter all pertinent 2013 amounts. Last year's amounts are provided for your reference.

NONCASH CONTRIBUTIONS

NOTE: Use Sheet 26 if total noncash contributions are over $500. No deduction is allowed for contributions of clothing and household items that are not in *good* used condition or better. In addition, a deduction for any item with minimal monetary value may be denied.

	2013 Amount	TS	2012 Amount
50% limitation (see above):			
30% limitation (see above):			
30% capital gain property (gifts of capital gain property to 50% limit orgs.):			
20% capital gain property (gifts of capital gain property to non-50% limit orgs.):			

MISCELLANEOUS DEDUCTIONS (subject to 2% AGI limit)

	2013 Amount	TS	2012 Amount
Union and professional dues			
Other unreimbursed employee expenses (uniforms and protective clothing, professional subscriptions, employment agency fees, and certain edu. expenses):			
Investment expense:			
Tax return preparation fee			
Safe deposit box rental			
Miscellaneous deductions (2% AGI) (certain legal and accounting fees, and custodial fees):			

2013	1040	US	Itemized Deductions (continued)	25 p4

Please enter all pertinent 2013 amounts. Last year's amounts are provided for your reference.

OTHER MISCELLANEOUS DEDUCTIONS

	2013 Amount	TS	2012 Amount
Estate tax, section 691(c)			
Other miscellaneous deductions:			

(T=taxpayer, S=spouse, Blank=joint)

If either of the following conditions below apply to you, your home mortgage interest deduction may need to be limited and the input section provided below should be completed. If neither condition applies, enter home mortgage interest amounts on organizer sheet 25 p2.

1. Total home equity debt exceeded $100,000 at any time during 2013 ($50,000 if married filing separate). For this purpose, home equity debt is defined as any mortgages taken out after October 13, 1987 in which the proceeds were used for purposes other than to buy, build, or improve your home. An example of this type of mortgage is a home equity loan use to pay off credit card bills, buy a car, or pay tuition.

2. Total home acquisition debt exceeded $1,000,000 at any time during 2013 ($500,000 if married filing separate). For this purpose, home acquisition debt is defined as any mortgages taken out after October 13, 1987 in which the proceeds were used to buy, build, or improve your home.

NOTE: When completing the input section below, grandfather debt represents loans taken out prior to October 14, 1987.

Please enter all pertinent 2013 amounts and attach all 1098 forms.
Last year's amounts are provided for your reference.

	2013 Amount	TS	2012 Amount
Fair market value of the property on the date that the last debt was secured			
Home acquisition and grandfather debt on the date that the last debt was secured			

LOAN INFORMATION

	2013 Amount	TS	2012 Amount
Loan #1			
Lender's name			
Form (see table)			
Number of form			
1=taxpayer, 2=spouse, blank=joint			
Interest paid			
Points paid			
Total principal paid			
Lump sum principal payment (if paid off)			
Months outstanding (if not 12)			
Home acquisition debt balance - beginning of year			
Home acquisition debt borrowed in 2013			
Home equity debt balance - beginning of year			
Home equity debt borrowed in 2013			
Grandfather debt balance - beginning of year			
Loan #2			
Lender's name			
Form (see table)			
Number of form			
1=taxpayer, 2=spouse, blank=joint			
Interest paid			
Points paid			
Total principal paid			
Lump sum principal payment (if paid off)			
Months outstanding (if not 12)			
Home acquisition debt balance - beginning of year			
Home acquisition debt borrowed in 2013			
Home equity debt balance - beginning of year			
Home equity debt borrowed in 2013			
Grandfather debt balance - beginning of year			

Form

1 = Schedule A (default)
2 = Business use of home
3 = Schedule E

2013	1040	US	Miscellaneous Questions

Please answer these questions and provide *ALL* W-2, 1099 and K-1 forms received!

Yes	No	
		MISC
☐	☐	Would you like to receive this printed organizer next year? If so; via Email?____
☐	☐	Would you like to opt out of receiving a copy of your completed tax return on CD?
☐	☐	Would you like to opt out of a prescheduled tax appointment next year?
☐	☐	Would you like to **opt-out** of our no-charge Electronic Filing service? We will automatically prepare your return for electronic filing unless you opt-out. (If you do not opt out at this time and opt out after your return is complete, there will be a $25 charge to change your return to a paper return.)
☐	☐	Would you like to have your refund direct deposited into your bank account? If so, please provide a voided check, if you did not provide one to our office last year.
☐	☐	**Can** you be claimed as a dependent on another person's tax return?
☐	☐	Did any of your dependents have income? If so, list amount earned, including interest and dividends, next to each dependent named on sheet 2.
		INCOME
☐	☐	Did you receive unreported tip income of $20 or more in any month?
☐	☐	Did you cash any Series EE U.S. savings bonds issued after 1989 and pay qualified higher education expenses for yourself, spouse, or dependents?
☐	☐	Did you have any foreign income or pay any foreign taxes?
		PURCHASES, SALES AND DEBT
☐	☐	Did you start a business or farm or purchase rental or royalty property?
☐	☐	Did you have a real estate transaction? If so, provide settlement statement.
☐	☐	Did anyone owe you money which had become uncollectible? If so, provide details of debt, amounts and dates.
		RETIREMENT PLANS
☐	☐	Did you make a contribution to an IRA, SEP, SIMPLE, Qualified Plan, etc. **other than what was reported on your W2 form**? If so, list the following information: Owner: ________ Tax year: ______ Date:_______ Amount:_______ Owner: ________ Tax year: ______ Date:_______ Amount:_______

2013	1040	US	Miscellaneous Questions

Yes	No	
		EDUCATION
☐	☐	Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school?
☐	☐	Did you fund a Qualified College Savings Plan? If so, please provide the amount and if the plan is a Qualified Oregon plan.
		ITEMIZED DEDUCTIONS
☐	☐	Did you incur a loss because of damaged or stolen property, in which your out of pocket expenses exceeded 10% of your income? If so, provide details of the loss.
☐	☐	Did you work out of town or use your car on the job (other than to/from work) without reimbursement? If so, provide the costs and/or mileage.
☐	☐	Did you purchase a business auto that has a gross vehicle weight greater than 6,000 pounds?
☐	☐	Did you purchase business fuel for off-road use, on which you paid road tax? List # of gallons:________
☐	☐	Did you incur job hunting expenses? If so, how much? $______
		SOLE PROPRIETORS ONLY
☐	☐	Do you need our office to prepare your W-2's and/or 1099's? If so, please provide details prior to Jan. 26th.
☐	☐	Do you have income derived within the following areas? If so, list the GROSS INCOME amount derived inside each area: $______________ In City of Portland $______________ In Multnomah County, OUT of City of Portland $______________ In Clackamas and Washington Counties $______________ In Lane County Transit District $______________ In Tri-Met Districts $______________ In Other states (outside Oregon). Specify states.
		MISCELLANEOUS
☐	☐	Do you and your spouse want to allocate $3 to the Presidential Election Campaign Fund?
☐	☐	Did you pay a premature withdrawal penalty, such as with a CD account? If so, amount: $___________
☐	☐	Do you have child day care expenses? If so, provide details of providers and amounts.

ORGANIZER

2013	1040	US	Miscellaneous Questions

Yes	No	
☐	☐	Was your home rented out or used for business? If so, provide total utility and insurance costs.
☐	☐	Did you incur moving expenses due to a job change? If so, list expenses here:
☐	☐	Did you hire the services of any household employee, who was not independently employed for others, but was employed by you?
☐	☐	Were you notified or audited by either the IRS or the State taxing agency?
☐	☐	Did you or your spouse make any gifts that total more than $14,000?
☐	☐	Do you rent, are over 58, have income of less than $10,000 & assets less than $25,000? Or, rent, are over 65, and have income of less than $10,000?
☐	☐	Do you have a federally qualified disabled child and an IEP plan in place at school for that child? If so, the child's name: _______________.
☐	☐	Did you pay a political contribution? If so, how much $_______
☐	☐	Did you make any energy efficient improvements to your home? If so, provide the amounts: Insulation Costs $______________ Exterior Windows $____________ Metal Roofing $______________ Exterior Doors $____________ Furnace $______________ Circulation Furnace Fan $____________
☐	☐	Did you improve your home using solar, wind, geothermal or fuel cell energy source? If so, provide amounts.
☐	☐	Did you purchase any energy efficient appliances that came with a special Oregon credit? If so, please provide the credit information/postcard, indentifying credit.
☐	☐	Did you purchase a new alternative energy vehicle? If so, provide car type and price if for electric or plug-in hybrid vehicle.
☐	☐	**Do you have an interest in any of these areas?** ( ) accounting services ( ) CD alternatives ( ) college funding options ( ) estate planning ( ) getting married tips ( ) insurance planning ( ) small business tips ( ) IRA tips & strategies ( ) mortgage loan services ( ) retirement account rollover ( ) retirement planning ( ) __________________