



# Nelson Company, P.C. Tax Organizer

Do NOT use estimates and please provide copies of forms  
 The IRS is more likely to audit if they see a round number (i.e. 0 or 5, seriously)

## Itemized Deductions

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

## Medical Expenses

Do not include expenses reimbursed by insurance or paid/reimbursed via an HSA

Prescriptions \_\_\_\_\_  
 Doctor/Dentist \_\_\_\_\_  
 Glasses/Orthodontia/Lab Fees \_\_\_\_\_  
 Other \_\_\_\_\_  
 Total Medical Miles Driven Jan. 1 to June 30 \_\_\_\_\_  
 Total Medical Miles Driven July 1 to Dec. 31 \_\_\_\_\_

Include miles driven to hospitals, doctors, dentists, to pick up prescriptions, etc.

## Real Estate/Local Taxes/Vehicle Excise Taxes Paid

### Real Estate Taxes paid

Primary Residence \_\_\_\_\_  
 Second Home/Land/RV\* \_\_\_\_\_

\*If the second home is a rental property, do not enter taxes paid here, enter on the "Rental Property Organizer."

### Other Taxes Paid

City of Portland Arts Tax \_\_\_\_\_  
 For CA residents: Personal Property Vehicle Tax \_\_\_\_\_  
 For non-OR residents: Sales Tax on Major Purchases (vehicles, appliances, equipment, remodeling, etc):

Description	Purchase Date	Original Cost	Sales Tax

## Mortgage Interest Paid - Please include all Forms 1098 and refinance HUD statements (if applicable)

Bank Name	Interest Paid	Points Paid	Mortgage Insurance



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

### Charitable Contributions

#### Cash/Check/Payroll Deduction

- if any one contribution exceeds \$250, please provide IRS-approved letter from donee

Organization Name	Amount	Letter?	OR C.T. Qualified?*
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

\*If you file an Oregon tax return, you may qualify for additional state deductions, if you donate to an Oregon Cultural Trust-qualified organization, please check here: <http://culturaltrust.org/get-involved/nonprofits/>

#### Non-Cash Contributions - items to Goodwill/Salvation Army/DI/ Elementary Schools/Toys for Tots

example: clothing/shoes/coats/furniture/electronics/household/kitchen/bedding/toys/books/sports equipment/

Organization/Address Donated to: Brief Description of Items Donated	Date	Fair Market Value - no decimals
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Organization/Address Donated to: Brief Description of Items Donated	Date	Fair Market Value - no decimals
_____	_____	_____
_____	_____	_____
_____	_____	_____

Organization/Address Donated to: Brief Description of Items Donated	Date	Fair Market Value - no decimals
_____	_____	_____
_____	_____	_____
_____	_____	_____

Charitable Miles Driven \_\_\_\_\_



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Remember to include volunteering in schools, churches and related activities, scouting, fundraisers, etc

## Itemized Deductions

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

## Other

Investment interest (no managed account fees) \_\_\_\_\_

Please note that tax preparation fees, union dues, unreimbursed employee expenses (including business miles driven as an employee, business meals or dues & publications as an employee), investment account fees and safe deposit box rental fees are no longer deductible under the Tax Cuts & Jobs Act of 2018.

## Notes