



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 _____
Long-Term Insurance Premiums _____
Other _____
Total Medical Miles Driven _____

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

Itemized Deductions

Name: _____

Other

Investment interest (no managed account fees)

Gambling Losses (up to gambling winnings)

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 One Big Beautiful Bill Act (OBBBA) of 2025.

Notes