



Price Estimate Worksheet

Begin by looking at your 2008 Tax Return. Flip through the pages to see which forms were prepared last year. Then read through the descriptions of each of the Federal and Oregon forms described on this Worksheet. Check "Yes" or "No" next to each form. When you are finished, bring this form by our office, or call us for an estimate. It is our policy to prepare and charge only for forms which are either required or provide a tax benefit for you.

Form Names and Descriptions Forms shown under Long Form 1040 cannot be filed with 1040EZ or 1040A. Forms shown under 1040A or EZ may be filed with 1040A.	Reporting form you might have received	I need this form	Form Price
1040A or EZ (Taxable Income under \$100,000)		Yes <input type="checkbox"/> No <input type="checkbox"/>	
B Interest or Dividend income is over \$1500 (This form is required if your interest or dividend income exceeds \$1500 for the year.)	Form 1099 INT or 1099 DIV	Yes <input type="checkbox"/> No <input type="checkbox"/>	
EIC Earned Income Credit (You may be eligible for this credit if your child lived with you, you worked and you earned less than \$48,000 for the year.)	Property taxes or new vehicle	Yes <input type="checkbox"/> No <input type="checkbox"/>	
L Standard Deduction for Certain Filers (If you are NOT itemizing on Sch A, this form is required to claim deductions for property taxes & taxes paid on purchase of a new vehicle.)		Yes <input type="checkbox"/> No <input type="checkbox"/>	
M Making Work Pay Credit (You need this form if you worked for pay or had self employment income. Your income must be less than \$95,000 if single or \$190,000 if married filing jointly.)	W2 or self employment	Yes <input type="checkbox"/> No <input type="checkbox"/>	
2441 Childcare Credit (You may be eligible for this credit if you paid for child care so you could go to work or to school.)	W2 or self employment income	Yes <input type="checkbox"/> No <input type="checkbox"/>	
8812 Additional Child Tax Credit (You may be eligible for this credit if you have children under the age of 17 and you have moderate to low income.)	W2 or self employment income	Yes <input type="checkbox"/> No <input type="checkbox"/>	
8863 Education Credits (You may be eligible for this credit if you or your dependent attended higher education classes and your income is less than \$80,000 if single or \$160,000 if married.)	Form 1098T	Yes <input type="checkbox"/> No <input type="checkbox"/>	
8880 Retirement Savings Credit (You may be eligible for this credit if your income is less than \$50,000 and you contributed money to your IRA or 401K plan)	You invested in your IRA or pension plan	Yes <input type="checkbox"/> No <input type="checkbox"/>	
Long Form 1040		Yes <input type="checkbox"/> No <input type="checkbox"/>	
A Itemized Deductions (This form is required if wish to claim deductions for home mortgage interest, property or income taxes, casualty losses, gifts to charity, employee business expenses or gambling losses. You may benefit from itemizing on your Oregon return even if you do not have enough deductions for your federal return.)	Form 1098 Mortgage interest statement	Yes <input type="checkbox"/> No <input type="checkbox"/>	
C or F Self-Employment/Farm Income (If you have a net profit from your business you must also file Schedule SE. If you purchased equipment or furniture you must also attach Form 4562 to your return).	Form 1099 MISC	Yes <input type="checkbox"/> No <input type="checkbox"/>	
C-EZ (If you are self employed and your business expenses are less than \$2500 you may qualify to use this short form instead of the full Schedule C.)	Form 1099 MISC	Yes <input type="checkbox"/> No <input type="checkbox"/>	
D Capital Gain/Loss (If you sold stocks, bonds, rental property, investment property you must file this form. You may be required to file this form if you exercised stock options at work, sold your home or sold personal property. There is a per item charge for this form of \$3 per sale which is added to the form charge.)	Form 1099 B or Form 1099 S	Yes <input type="checkbox"/> No <input type="checkbox"/>	
E Rental Property or Royalty Income (Charge is per property) (If this is the first year you are reporting rental income or if you made improvements to your rental property, you will also be required to file Form 4562)	Form 1099 MISC (rental receipts)	Yes <input type="checkbox"/> No <input type="checkbox"/>	
E Page 2 K-1 Income (Charge is per entity) If you are an owner or beneficiary of a Partnership, S-Corporation, Trust or Estate, you should receive Schedule K-1 reporting your share of income. Schedule E Page 2 is a required form if you received a K-1. Other forms and schedules may be required depending upon the types of income, deductions and credits being passed through to you on your Form K1)	Schedule K-1 from a Partnership, S-Corp, Trust or Estate	Yes <input type="checkbox"/> No <input type="checkbox"/>	
SE Self-Employment Tax (If you are self employed and had a profit of \$400 or more, this form is required. You will also need to attach Schedule C)		Yes <input type="checkbox"/> No <input type="checkbox"/>	
Form 982 (If had debt was cancelled or forgiven or if your home was foreclosed on, you may need to file this form.)	Form 1099A or 1099C	Yes <input type="checkbox"/> No <input type="checkbox"/>	
2106 Employee Business Expenses (Must be filed with Schedule A. If you are claiming office use of home or if you purchased assets such as furniture or office equipment, you may also need to attach Forms 8829 and/or 4562)	Form W2	Yes <input type="checkbox"/> No <input type="checkbox"/>	

Form Names and Descriptions	Reporting Forms you might have received	I need this form	Form Price
2210 Underpayment of Tax (If you owe more than \$1,000 when you file your return, or if you made estimated tax payments, you may need to file this form)		Yes <input type="checkbox"/> No <input type="checkbox"/>	
3903 Moving Expenses (You may be able to deduct moving expenses if you moved more than 50 miles and you went to work from your new home.)		Yes <input type="checkbox"/> No <input type="checkbox"/>	
Form 4137 or 8919 Uncollected Social Security and Medicare Tax on Wages (If you received allocated tips, failed to report tips to your employer, or if your employer paid you cash for services but did not withhold taxes, you are required to file this form.)		Yes <input type="checkbox"/> No <input type="checkbox"/>	
4562 Depreciation (+ \$3 per item) (This is a required business form which must be used when a new asset such as a computer is placed in service in your business or rental property)		Yes <input type="checkbox"/> No <input type="checkbox"/>	
4797 Sold Business Assets (+ \$3/sale) (This form is required if you sold rental property, business use car, or other business assets. It is likely Schedule D may also be required if you file this form)	Form 1099S	Yes <input type="checkbox"/> No <input type="checkbox"/>	
4684 Casualty or Theft Loss (If you suffered a personal loss due to a sudden event or theft you may be able to claim your loss. This form must be filed with Schedule A)		Yes <input type="checkbox"/> No <input type="checkbox"/>	
5329 Early Withdrawal Penalty (If you took an early withdrawal from any IRA or pension plan, you may be required to file this form.)	Form 1099R	Yes <input type="checkbox"/> No <input type="checkbox"/>	
5405 First Time Homebuyer Credit (If you bought a new home and you have not owned a home within 3 years of purchasing your new home, you may qualify for this credit.)		Yes <input type="checkbox"/> No <input type="checkbox"/>	
5695 Residential Energy Credit (If you installed new energy efficient windows, doors, insulation, solar water heater, on demand hot water heater, metal roof, fuel cell device or high-efficiency furnace or heat pump you may qualify for this credit)	Check with the vendor who sold you the property	Yes <input type="checkbox"/> No <input type="checkbox"/>	
6251 Alternative Minimum Tax (You might be required to file this form if your income is over \$100,000)		Yes <input type="checkbox"/> No <input type="checkbox"/>	
8283 Non-Cash donations to charity valued at more than \$500 (If you gave personal belongings or stock to charity and the value of your donation is greater than \$500, you must attach this form to your return. If you file this form you must also use Schedule A.)		Yes <input type="checkbox"/> No <input type="checkbox"/>	
8615 Kiddie Tax (If you are child under age 18 with more than \$1,600 of investment income, you may need to file this form)	Child received 1099 INT or 1099 DIV	Yes <input type="checkbox"/> No <input type="checkbox"/>	
8829 Office in the Home (If you are claiming office use of home, you must attach Schedule C)		Yes <input type="checkbox"/> No <input type="checkbox"/>	
8910 Hybrid Car Credit (This form is used in the year you purchased a new Hybrid car)		Yes <input type="checkbox"/> No <input type="checkbox"/>	
Other forms		Yes <input type="checkbox"/> No <input type="checkbox"/>	
State Forms and Schedules Forms & Schedules			
Oregon Form 40, 40S, 40N, or 40P		Yes <input type="checkbox"/> No <input type="checkbox"/>	
WFC Oregon Working Family Childcare Credit (If you are low income and you paid for child care so you could go to work or school, you may qualify for this credit.)		Yes <input type="checkbox"/> No <input type="checkbox"/>	
OR Sch ASC (This form is required if you claim multiple credits, additions or subtractions on your Oregon return).		Yes <input type="checkbox"/> No <input type="checkbox"/>	
SP Business License (If you are self employed and did business inside the City of Portland or Multnomah County, you may be required to file this form.)		Yes <input type="checkbox"/> No <input type="checkbox"/>	
TM Tri-Met (If you are self employed and did business inside Multnomah, Washington, Clackamas or Lane Counties you may be required to use this form.)		Yes <input type="checkbox"/> No <input type="checkbox"/>	
Out-of-State Return (if you had income from any state outside Oregon or if you moved to or from Oregon during the year, you may be required to file an out-of-state tax return.)		Yes <input type="checkbox"/> No <input type="checkbox"/>	
Other Charges			
Chase Bonu\$ or Loan Fee (If you would like to have your tax preparation fees withheld from your refund or if you would like to get a loan on your refund, additional bank charges will apply. Bank fees vary according to the amount of your refund. See our Refund Loan page for pricing.)		Yes <input type="checkbox"/> No <input type="checkbox"/>	
Bookkeeping rate (if you would like us to prepare business profit and loss for your business or rental property, a bookkeeping fee may apply.)		Yes <input type="checkbox"/> No <input type="checkbox"/>	
Total Estimated Fee		Yes <input type="checkbox"/> No <input type="checkbox"/>	