

Welcome!

As a seasoned family-run tax consultancy in the heart of Portland, Oregon, we've proudly served our community for 80 years. Our enduring commitment to providing personalized tax services has allowed us to grow alongside our cherished clients. We understand that tax season can be overwhelming. Our approach underscores our commitment to accessibility and personal touch in an increasingly impersonal digital age. We specialize in a comprehensive range of individual tax return services, catering to a diverse clientele that includes individuals with simple W2 employment, retirees, small business owners, and rental property owners. Our expertise in handling tax returns ensures that we can navigate the complexities of each unique financial situation with precision and care.

To work with us, simply come in and start preparing your taxes. We prefer to engage through in-person consultations. During tax season, we don't schedule appointments; feel free to visit us when you're ready. Missing some documents? We understand that certain forms, like K1s and 1099s, may not be available yet. Please bring in everything you have, and once you receive the final piece, we'll complete the process.

Steps to Engage with our Team:

- Gather your tax documents:
 - A full copy of last year's tax return
 - Government-issued ID and Social Security cards
 - Completed New Client Onboarding packet
 - All 2025 tax forms (see Tax Prep Checklist below)
 - Helpful worksheets can be found on the Resources page of our website
 - Bring a list of questions that you may have
- Come in! We do not take appointments during the tax filing season.

When you come in to have your taxes prepared, you will sit down with one of our licensed tax consultants to review your prior year tax return, your current year information, and any questions you or we may have. Once the initial interview is over you will leave your documents with us, and we will continue working on your return. When it is complete and ready for you to file, we will let you know. When it's convenient, you will come back to review the return, sign the e-file authorization, and pay our invoice. We will then e-file your returns with the appropriate agencies, or provide a packet of items to mail if e-file is not an option. We will also provide you with a complete printout of all forms, your original documents, and upload a digital copy to your client portal.

Our typical turnaround time from when you provide the last piece of information to completion is about 2 to 3 weeks. However, circumstances can impact this timing. If you are missing documents when you come to see us, we will set your return aside until you have the remaining information. So please be sure to get us the missing information as soon as you can. If we get too close to the deadline and are still missing documents, we will e-file an extension for you until you are able to gather the remaining information. We have an article on what it means to file an extension on our website.

As we continue to uphold the values of our family firm, we remain committed to providing professional, yet easily accessible tax services. In a world where numbers often overshadow narratives, we strive to add a personal touch to each interaction. Connect with us and experience a tax filing process that's as reliable and friendly as family.

Sincerely,

Your RELIABLE TAX Team

TAXPAYER INFORMATION

Primary taxpayer listed first on the tax return

First Name		M.I.	Last Name	
SSN or ITIN		Date of Birth		IP PIN
Phone		Email address		
Driver's License Number	State	Issue Date	Exp. Date	

SPOUSE INFORMATION

If married

First Name		M.I.	Last Name	
SSN or ITIN		Date of Birth		IP PIN
Phone		Email address		
Driver's License Number	State	Issue Date	Exp. Date	

CURRENT MAILING ADDRESS

Street			Unit #
City	County	State	Zip

DEPENDENTS

Dependent Children Child's Name [First, Middle Initial, Last]	Social Security #	Date of birth	IP PIN	Relationship	Months lived in home in '25

- Yes No Did any children have unearned income (interest, dividends, unemployment, etc.) above \$1,350?
- Yes No Do any of the children have a disability, IEP or 504 plan?
- Yes No Is it anticipated that a different taxpayer will seek to claim a child listed as their dependent?

Other Dependents Full Name [First, Middle Initial, Last]	Social Security #	Date of birth	IP PIN	Relationship	Months in home in '25	Income

BANK INFORMATION

For direct deposit of tax refunds and/or direct debit of tax payments

Name of Bank	Account number	Routing number	<input type="checkbox"/> Checking <input type="checkbox"/> Savings
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Each year, we require our clients to complete an intake form that covers year-specific questions. This helps us identify any potential changes in your situation and implement any new tax law changes that may be relevant to you.

GENERAL INFORMATION

1. How would you like us to contact you about your tax return? Phone e-mail
2. Marital Status on 12/31/2025: Single Married
3. Yes No Were there any changes in dependents? Explain: _____
4. Yes No Did your address change during the year? Date of move: _____
5. Yes No Oregon Department of Revenue is requesting voluntary self-identification of your race and ethnicity. Check yes if you would like to participate, or check no if you would like to opt out of the voluntary program.

INCOME AND SALES

6. Please check all that apply:

- | | | | |
|---|--|---|---|
| <input type="checkbox"/> Wages / employment | <input type="checkbox"/> Tip income | <input type="checkbox"/> Sale of property | <input type="checkbox"/> Jury duty |
| <input type="checkbox"/> Pension / retirement | <input type="checkbox"/> Overtime pay | <input type="checkbox"/> Installment sale | <input type="checkbox"/> Alimony |
| <input type="checkbox"/> Social Security / Disability | <input type="checkbox"/> Self-employed / Gig | <input type="checkbox"/> Inheritance | <input type="checkbox"/> Rollover |
| <input type="checkbox"/> Bank interest | <input type="checkbox"/> Hobby income | <input type="checkbox"/> Foreclosure / repossession | <input type="checkbox"/> IRA Conversions |
| <input type="checkbox"/> Stock investments | <input type="checkbox"/> Rental income | <input type="checkbox"/> Canceled debt | <input type="checkbox"/> Backdoor Roth Conversion |
| <input type="checkbox"/> Employee stock options | <input type="checkbox"/> Farming / fishing | <input type="checkbox"/> Prizes or awards | <input type="checkbox"/> Foreign income |
| <input type="checkbox"/> Unemployment income | <input type="checkbox"/> K1 Passthrough income | <input type="checkbox"/> Gambling or lottery | <input type="checkbox"/> Other income |

7. Yes No N/A If employed, do you participate in the Oregon Saves retirement program?

8. Yes No Did you own any virtual currency / cryptocurrency? e.g. Bitcoin, Ethereum, Dogecoin, etc.
Check all that apply in 2025: Acquire / Buy Send / Pay for services Trade / Exchange / Sell

DEDUCTIONS AND CREDITS

9. Please check all that apply:

- | | | | |
|--|---|--|--|
| <input type="checkbox"/> Alimony paid | <input type="checkbox"/> Medical expenses | <input type="checkbox"/> Property taxes | <input type="checkbox"/> College tuition |
| <input type="checkbox"/> K-12 Teacher expenses | <input type="checkbox"/> Mortgage interest | <input type="checkbox"/> Donations - items | <input type="checkbox"/> Childcare expenses |
| <input type="checkbox"/> Retirement contribution | <input type="checkbox"/> HELOC interest | <input type="checkbox"/> Donations - money | <input type="checkbox"/> OR 529 College Savings |
| <input type="checkbox"/> Student Loan Interest | <input type="checkbox"/> RV / Boat interest | <input type="checkbox"/> Volunteer miles | <input type="checkbox"/> Political contributions |
| <input type="checkbox"/> Health Savings Account | <input type="checkbox"/> Car loan interest (new 2025 purchase of USA-made or assembled vehicle) | | |

10. Yes No Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan? Provide closing statement and all Forms 1098.

This letter is to inform you, the taxpayer, of the services we will provide you, and the responsibilities you have for preparation of your tax return.

TAX RETURN PREPARATION

- We will prepare your 2025 Form 1040, U.S. Individual Income Tax Return, and applicable state and local tax return(s) based on information you provide. Services for preparation of your returns do not include auditing or verification of information provided by you.
- This engagement does not include any audit or examination of your books or records. In the event your return is audited, you will be responsible for verifying the items reported.
- Assisting you with your compliance with the Corporate Transparency Act, including beneficial ownership information reporting, is not within the scope of this engagement.
- The tax return preparation fee does not include bookkeeping. Additional fees apply for these services.
- Fees charged for tax return preparation do not include audit representation or preparing materials to respond to correspondence from taxing authorities.
- Preparation fees do cover limited assistance and consultation during the year. Detailed consultations, calculations, and tax planning requested by you will be billed separately.
- The engagement to prepare your 2025 tax returns terminates upon delivery of your completed returns and original documents to you. Please store your supporting documents and your tax returns in a secure place for at least seven years. You may be assessed a fee if you request a duplicate copy in the future.

TAXPAYER RESPONSIBILITIES

- You agree to provide us all income and deductible expense information. If you receive additional information after we begin working on your return, you will contact us immediately to ensure your completed tax returns contain all relevant information.
- You affirm that all expenses or other deduction amounts are accurate and that you have all required supporting written records. In some cases, we will ask to review your documentation.
- You must be able to provide written records of all items included on your return if audited by either the IRS, State, or local tax authority. We can provide guidance concerning what evidence is acceptable.
- You must review the returns carefully before signing to make sure the information is correct.
- Fees must be paid before your tax returns are delivered to you or filed for you. If you terminate this engagement before completion, you agree to pay a fee for work completed. A retainer may be required.

By signing below, you acknowledge that you have read, understand, and accept your obligations and responsibilities and that you understand our responsibilities in preparing your tax returns as explained above. For a joint return, both taxpayers must sign.

Taxpayer Signature

Taxpayer Name (please print)

Date

Spouse Signature

Spouse Name (please print)

Date

PRIVACY POLICY

The nature of our work requires us to collect certain nonpublic personal information. We collect financial and personal information from applications, worksheets, reporting statements, and other forms, as well as interviews and conversations with our clients and affiliates. We may also review banking and credit card information about our clients in the performance of receipt of payment.

Under our policy, all information we obtain about you will be provided by you or obtained with your permission. Our firm has procedures and policies in place to protect your confidential information. We restrict access to your confidential information to those within our firm who need to know in order to provide you with services. We will not disclose your personal information to a third party without your permission, except where required by law. We maintain physical, electronic, and procedural safeguards in compliance with federal regulations that protect your personal information from unauthorized access. Please contact us with any questions regarding our privacy policy.

(Required Under Internal Revenue Code §7216 and Treas. Reg. §301.7216-3)

As part of our commitment to accuracy, security, and efficient service, our office uses professional tax preparation and data-management software to prepare, research, review, electronically file, and securely store your tax return information. Federal law—specifically Internal Revenue Code §7216 and related Treasury Regulations—requires us to obtain your written consent before using or disclosing your tax return information for certain purposes, including the use of third-party software providers that assist us in preparing and maintaining your tax records.

WHAT THIS MEANS FOR YOU

Your tax return information may be accessed, processed, transmitted, or stored by trusted third-party software providers **solely for purposes related to tax preparation, tax compliance, quality review, record retention, and related professional services** that you have engaged us to perform.

These providers are contractually required to:

- Use your information only to support our tax services
- Maintain confidentiality and safeguard your data
- Comply with applicable federal and state privacy and security requirements

We **do not** sell, rent, or use your tax return information for marketing purposes, nor do we authorize third parties to do so.

YOUR CONSENT IS REQUIRED

Federal regulations require that this consent:

- Be provided separately from your engagement agreement
- Clearly describe how your information may be used
- Be signed by you before we may proceed

Please review the enclosed consent carefully, sign where indicated, and return it to our office. If you have any questions about this disclosure or how your information is protected, we are happy to discuss this with you.

Thank you for your trust in our firm. We appreciate the opportunity to serve you.

1. FEDERAL LAW REQUIREMENT

Federal law requires this consent form be signed before a tax return preparer may use or disclose a taxpayer's tax return information for purposes other than preparing, assisting in preparing, or filing a tax return, unless an exception applies.

2. PARTIES AUTHORIZED

Tax Return Preparer:

Reliable Income Tax Service Inc dba Reliable Tax, 3200 N Lombard St. Portland, OR 97217 (503) 289-4500

Third-Party Software Providers:

Professional software and technology service providers used to prepare, review, electronically file, store, back up, and manage tax return information (including cloud-based systems, secure document portals, and tax preparation platforms).

3. PURPOSE OF USE AND DISCLOSURE

Your tax return information may be used and disclosed **solely for the following purposes**:

- Preparing and electronically filing federal, state, and local tax returns
- Reviewing tax returns for accuracy and compliance
- Maintaining secure electronic records of tax returns and supporting documents
- Back-up, disaster recovery, and data-security functions
- Providing related tax compliance and professional services you have requested

No use or disclosure will be made for marketing, solicitation, or any purpose unrelated to tax preparation, review, resolution, and compliance services.

4. TYPE OF INFORMATION DISCLOSED

The information used or disclosed may include, but is not limited to:

- Names, addresses, and taxpayer identification numbers
- Income, deduction, credit, and tax liability information
- Bank account and routing numbers for authorized electronic filing or payment
- Supporting tax documents and workpapers

5. DURATION OF CONSENT

This consent is effective upon signature and remains in effect for **one year** from the date signed, unless revoked earlier in writing.

6. YOUR RIGHTS

- You are **not required** to sign this consent.
- If you do not sign, we may be unable to provide tax preparation services that rely on third-party software.
- Once your tax return information is disclosed to a third party, federal law may no longer protect it from further disclosure, although contractual and legal safeguards remain in place.

7. PROHIBITION ON REDISCLOSURE

Third parties receiving your tax return information are prohibited from using or disclosing it for any purpose other than those stated above, except as permitted by law.

CONSENT

By signing below, you authorize the use and disclosure of your tax return information as described in this document.

Taxpayer Signature

Taxpayer Name (please print)

Date

Spouse Signature

Spouse Name (please print)

Date

*This consent complies with the requirements of **Internal Revenue Code §7216** and **Treasury Regulation §301.7216-3**. Copies of this consent must be retained by the tax return preparer.*

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484 or by email at complaints@tigta.treas.gov.

This is a basic checklist of documentation needed to start organizing your tax return information. Although this is not an all-inclusive list, it will help steer you in the right direction. As you begin receiving important tax documents in January, file them with this checklist. The [Resources](#) page of our website has many detailed worksheets that can help you get organized. Feel free to call or email us if you need help or guidance in getting everything together.

GENERAL

- Copy of your last filed tax return (unless prepared by our office)
- Completed annual Intake Questionnaire and signed Engagement Letter (available online or in our office)
- Any notices you received from the Internal Revenue Service, your State or City or other taxing entity
- Social Security number and date of birth for yourself, your spouse, and your dependents
- Mailing address, email addresses, and telephone numbers
- Drivers license for identity verification for you and your spouse
- All W-2 Forms from all employers you and your spouse received
- Savings and Investments reporting forms including Form 1099-INT, 1099-DIV, 1099-B, 1099-S or Schedule K-1
- Statements of income from retirement distributions or Social Security including Form 1099-R or SSA-1099
- Form 1099-G or 1099-misc from State unemployment benefits, medical leave, or State/Local tax refunds
- Form 1099-A or 1099-C for any Cancellation of Debt
- Records of other income including but not limited to: Form W2-G for gambling income and losses, spousal support/alimony received, jury duty, hobby income and expenses, prizes and awards
- Closing documents on any real estate transaction you had during the year, including purchase, sale, or refinance
- Any spousal support/alimony you paid, date of legal separation, and the name and SSN of the recipient
- If you are a K-12 teacher, record of any unreimbursed classroom expenses (including PPE)
- Form 1099-SA and Form 5498-SA for Health Savings Account distributions and contributions
- Record of Traditional IRA or Roth IRA contributions or conversions
- Form 1098-E for any Student Loan Interest paid
- Form 1099-Q for any College Savings plan distributions

BUSINESS, RENTAL, AND FARMING INCOME

- The books/accounting records for your business, including all income and expenses, in whatever format you keep your records
- Any Forms 1099-MISC, 1099-NEC, and 1099-K (Income reported by credit card companies or third party payment processors such as PayPal, Square, etc.) for income that you received
- Records of all major purchases \$500 or greater, such as machinery, equipment, furniture including date of purchase for any item that was purchased or placed in service during the year
- Copies of all Forms W2/W3 and/or 1099-NEC and 1099-MISC that your business filed
- Inventory records (beginning and ending inventory, purchases, and amounts for personal use)
- Mileage logs, including total annual and business mileage for any vehicles with business use
- For self-employed individuals, health insurance premiums (including dental and vision) paid for owner and family, including adult children less than 27 years old

ITEMIZED DEDUCTIONS

- Medical expenses (co-pays, doctors, dentists, glasses, prescriptions, supplies, and medical mileage)
- Out of pocket Health insurance premiums paid, including COBRA (not paid through your employer)
- State and local income taxes paid (not those withheld on Forms W2 or 1099)
- Mortgage interest paid reported on Form 1098
- Mortgage insurance paid (at closing or reported on Form 1098)
- Investment interest expenses — margin account interest or interest on investment property
- Total cash charitable donations (not including political contributions) — We do not need to see the documentation but make sure you keep it with your records.
- Records of non-cash charitable donations including items donated, receiving charity, date and value of donation
- If you donated a vehicle, Form 1099-C
- Total volunteer miles driven during the year

CREDITS

- Form 1095-A Health Insurance Marketplace Statement if your household health coverage was acquired through the healthcare marketplace
- Dependent care expenses, including amount paid, provider's name, address, phone number, and tax ID number
- Form 1098-T for Tuition and fees paid as well as costs of required books, supplies and equipment
- Record of political contributions (Oregon filers only)
- Adoption expenses if you adopted a child or finalized the adoption last year
- Residential energy credits - including costs for solar electric property, solar water heaters, geothermal heat pumps, small wind turbines and fuel cell property
- If you received the First Time Homebuyer Credit in 2008, please make sure we have records of the original purchase and the remaining amount of repayment
- Record of estimated taxes paid to the Federal, State, and local taxing agencies