

Taxpayer \_\_\_\_\_

Spouse \_\_\_\_\_

print sign

**THINGS TO BRING TO YOUR APPOINTMENT**

- Drivers' licenses or State ID cards **and newly issued ones to update our records**
- W-2 (wages)
- 1099-INT (interest income), 1099-DIV (dividend income)
- Any Foreign Investment Accounts? Foreign Assets or Real Estate? (your **WORLDWIDE** income)
- 1099-B (sale of securities or mutual funds), **ALSO** need purchase date and cost (or basis) if not on form
- 1099-R (IRA/Keogh or other retirement plan withdrawals) Repay PERS?
- 1099-G (unemployment compensation)  1099-MISC (commissions, fees, etc.)
- Business income and expenses, Did you start or end a business? Receive form 1099-K?
- SSA-1099 (social security compensation),  Other 1099 forms
- K-1 (partnerships, estates, trusts, etc.)
- FINAL closing statement if you refinanced, bought or sold your home
- 1098-Mortgage Interest, How were the funds used?  **Mortgage Insurance Premiums.** And real estate taxes paid
- Record of estimate tax payments (or canceled checks) with date paid

**A. QUESTIONS ("you" means you or your spouse)**

**Check one or more:**  On Dec.31<sup>st</sup>, were you not married (never married or legally divorced)?  
 Are you married to each other?  Are you a widow(er)  Are you considering a divorce?  
 Are you a Registered Oregon Domestic Partner

- Any change in your marital status, dependents, address, or telephone number?
- Anyone else living in your home, or address, or you support? List their name and birth date

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- If married, do either taxpayer or spouse, choose to file a separate tax return?
  - Did you have any children under age 19 or full-time students under age 24, with total investment income in excess of \$1050?

**At any time during 2019, did you receive, sell, send, exchange or otherwise acquire any financial interest in any virtual currency?  Yes or  No**

- Did you, or do you plan on contributing to an IRA, ROTH, SEP, Keogh, SIMPLE, or Coverdell plan?
- Did you have a retirement plan withdrawal, rollover, conversion or lump sum distribution?
- Have you ever made a **NONDEDUCTABLE** contribution to your traditional IRA?
- Did you incur any education tuition, books and materials or loan interest? Need Form 1098-T
- Did you sell, exchange or rollover any stock, mutual fund, or other investments or assets?
- Did you receive or pay any alimony? Divorce papers needed.
- Did you pay childcare expenses? Provider name, address, EIN, phone number
- Did you receive any tips or gratuities?
- Did you travel between more than one job location or travel to a temporary work location?
- Did you make loan payments on a boat or RV that has basic living accommodations?
- Do you have any forgiven income?  Did you file or plan to file for bankruptcy?
- Do you have any self-employment or business income?  Were you a Uber driver (or similar)?
- Do you have rent income?  Did you collect income from AirBnB (or or other shared housing)?
- Does your employer have an incentive stock option or stock purchase plan?
- Do you buy or sell call or put options? Trade on the foreign exchange?
- Do you have any other income? (Jury duty, "under the table", prizes, awards, etc.)
- Did you receive any correspondence from IRS or Oregon Department of Revenue?
- Did you gift \$15,000 or more to someone?
- Make any energy savings improvements to your home?
- Did you employ an individual to perform household services in your home? Pay \$1000 a qtr or \$2100 yr
- Did you receive a credit of \$7500 from a home purchased in 2008?
- Do you want a Direct Deposit of your refund? The account used last year still valid?
- Did you and your dependents have subsidized health insurance for any months of 2019? Form 1095-A

B. INCOME

- Wages
- Interest, Dividends, including tax exempt
- Municipal Bonds
- Installment sale payments received
- Retirement plan distributions, disability income
- Rent, tenants' deposits that you are keeping
- Social Security Benefits or Railroad Retirement Benefits
- Bartering, sales on the Internet, do you own "Bitcoins" or any other virtual currency?
- Gambling income, any other income

C. DEDUCTIONS

D. Medical Expenses

(MAY NEED EXPENSES FOR EACH PERSON, SEPERATELY)

(Do not include any amounts paid for or reimbursed by medical insurance.)

(Do not include insurance premiums paid with pre-tax income.)

- Hospitalization and Health insurance premiums, Dental or contact lens insurance
- Long term care insurance premiums
- Prescribed drugs and insulin
- Doctor, Clinic or Hospital fees
- Dentists, Orthodontists fees, Glasses, contacts and eye examinations
- Nurses, ambulance, Alcoholism treatment
- Nursing or retirement home (medical care only)
- Medical transportation, medical miles, parking
- Medicare Insurance paid outside of Social Security Benefits

Other Taxes

- State income taxes, State sales taxes
- Real estate tax, (including deferred taxes), interest charges, casualty loss
- Did you pay the Portland Arts Tax?

Interest Paid (on primary and 2<sup>nd</sup> residence)

- 1<sup>st</sup> mortgage, 2<sup>nd</sup> mortgage
- Home equity or home improvement loan
- Points amortization
- Are you paying for mortgage insurance premiums on a new contract?
- Have you ever refinanced your current home loan and taken funds out for other use?

Contributions-CASH (Receipt or canceled check, required)

- Church, Synagogues, United Way, Cancer, Heart, Scouts, MS, MD, ADA

Contributions-NONCASH (Good or better condition, only)

- Goodwill, Salvation Army, ARC
- Donation of a vehicle (Form 1098-C)
- Mileage (need log book)

MISCELLANEOUS

- Gambling losses

E. Alternative Minimum Tax Issues (AMT)

- Mortgage interest that is not from buy, build or improve your non-mobile home
- Home Equity Loan, RV or Boat Loan
- Exercise incentive stock options
- Tax exempt interest from private activity bonds

G. OREGON ISSUES

- Are you or your dependents disabled? (IEP or IFSP)
- Did you contribute to an Oregon College Savings Plan? (Sec. 529), **When?**
- Did you make a political contribution?
- Are you **65** or older and have any medical deductions? Need expenses by person.
- Are you planning to or did you purchase your first home?**