2022 TAX ORGANIZER & DEDUCTION FINDER (BOLD is new)	Marino and Associates, Inc 1428 SE 20 th Avenue
Taxpayer (T)	Portland, OR 97214 503-239-4716
Taxpayer (1)	www.MarinoTaxPro.com
Spouse (S)	V 2022A
print sign	
FIRST STEP	
☐ Yes or ☐ No. Do you have a new 2023 IP PIN? (Identify Protection PIN).
☐ Yes or ☐ No. Any Foreign Investment Accounts? Foreign Assets or Real E	Éstate? (WORLDWIDE income)
☐ Yes or ☐ No. At any time during 2022, did you receive (as a rewa	
property or services), sell, exchange, gift or otherwise dispose of	a digital asset (or financial
interest in any virtual currency)? THINGS TO BRING/SEND TO YOUR APPOINTMENT	
Current Drivers' licenses or State ID cards (if not on file)	
☐ W-2 (wage income)	
1099-INT (interest income), 1099-DIV (dividend income)	
☐ 1099-B (sale of securities or mutual funds), ALSO need purchase date and	d cost (or basis) if not on form
1099-R (IRA/Keogh or other retirement plan withdrawals) Repay PERS?	
□ 1099-G (unemployment compensation) □ 1099-NEC or MISC (commission	· · · · · · · · · · · · · · · · · · ·
Business income and expenses, Did you start or end a business? Receive SSA-1099 (social security compensation), ☐ Other 1099 forms	form 1099-K?
☐ K-1 (partnerships, S- Corp, estates, trusts, etc.)	
☐ FINAL closing statement if you refinanced, bought or sold your home	
☐ 1098-Mortgage Interest, How were the funds used? ☐ Mortgage Insurance	e Premiums.
Real estate taxes paid	
Record of estimate tax payments (or canceled checks) with date paid QUESTIONS ("you" means you or your spouse)	
Check one or more: ☐ On Dec.31st, were you not married (never married or	r legally divorced)?
☐ Are you married to each other? ☐ Are you a widow(er) ☐ Are you	
☐Are you a Registered Oregon Domestic Partner	G
Any change in your marital status, dependents, address, or telephone num	
Anyone else living in your home, or address, or you support? List their nan	ne and birth date
☐ If married, do either taxpayer or spouse, choose to file a separate tax retur	n?
☐ Did you have any children under age 19 or full-time students under a	age 24, with total investment
income in excess of \$1150?	
Did you, or do you plan on contributing to an IRA, ROTH, SEP, Keogh, SI	•
☐ Did you have a retirement plan withdrawal, rollover, conversion or lump su☐ Have you ever made a NONDEDUCTABLE contribution to your traditional	
☐ Did you incur any education tuition, books and materials or loan interest?	
Did you sell, exchange or rollover any stock, mutual fund, or other investm	
☐ Did you receive or pay any alimony? Divorce papers needed for deduction	
Did you pay childcare expenses? Provider name, address, EIN, phone nur	mber
Did you receive any tips or gratuities?	
Did you make loan payments on a boat or RV that has basic living accomm	
☐ Do you have any forgiven income? ☐ Did you file or plan to file for bankrup☐ Do you have any self-employment or business income? ☐ Were you a Ubo	
☐ Do you have rent income? ☐ Did you collect income from AirBnB (or or oth	
Does your employer have an incentive stock option, stock purchase plan of	
☐ 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, award	
Did you receive any correspondence from IRS, Oregon Department of Rev	venue or other taxing authority?
☐ Did you gift more than \$16,000 to someone? (\$17,000 for 2023) ☐ Make any energy saving improvements to your home?	
- make any onergy caring improvements to your nome:	

□ Did you employ an individual to perform household services in your home? Pay \$1000 a qtr or \$2400 a yr? Example. Do you employ a nanny, health care provider, or other domestic worker in your home? □ Do you want a Direct Deposit of your refund? The account used last year still valid? □ Yes or □ No. □ Do you want your balanced due to be paid electronically? Same account as last year? □ Yes or □ No. □ Do you want your estimated tax payments to be paid electronically? Same acct? □ Yes or □ No. ■ Will you have this account open all year? □ Yes or □ No. □ Did you or your dependents have FEDERAL subsidized health ins. for any months of 2022? Form 1095-A We not not need form 1095-B or form 1095-C Only 1095-A.
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 cancelled or forgiven debt, any other income
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.)
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 to the extent of winnings \$
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

Are you or your dependents disabled? (IEP or IFSP) Need cover page.	
Did you contribute to an Oregon College Savings Plan? (Sec. 529)	
Did you contribute to an Oregon Able Account? (Sec. 529A)	
Did your child contribute to an Oregon College Savings Plan? (Sec. 529),	
Did you make a political contribution?	
Are you 66 or older and have any medical deductions? Need expenses by person.	
Are you planning to purchase your first personal residence?	
OCAL TAX ISSUES	
you are subject to either of the new Metro Supportive Housing Tax OR the Multnomah County reschool for All Tax and you are a NON-RESIDENT, list the address of your job location here:	
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NON-RESIDENT means that your residence is not in Multnomah County (for the Multnomah County Preschool for All Tax) or not in Multnomah, Washington or Clackamas Counties (for the Metro Supportive Housing Tax)

For the Multnomah County Preschool for All Tax

If you worked for your employer in both Multnomah County and outside Multnomah County, request a signed statement from your emplyer verifying the number of days worked in Multnomah County and the total number of days worked everywhere. Do not include holidays, vacation days or sick days, as days actually worked.

For the Metro Supportive Housing Tax

ODECON ICCLIES

If you worked for your employer in both Metro and outside Metro, request a signed statement from your emplyer verifying the number of days worked in Metro and the total number of days worked everywhere. Do not include holidays, vacation days or sick days, as days actually worked.