

- Make any energy saving improvements to your home? Purchase a EV?
- Did you employ an individual to perform household services in your home? Pay \$1000 a qtr or \$2600 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 2023? 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

DEDUCTIONS

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 2nd residence)

- 1st mortgage, 2nd mortgage
- Home equity or home improvement loan
- 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, etc. \$ _____

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

OREGON ISSUES

- 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?

LOCAL TAX ISSUES

If you are subject to either of the new Metro Supportive Housing Tax OR the Multnomah County Preschool for All Tax and you are a NON-RESIDENT, list the address of your job location here:

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 employer 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

If you worked for your employer in both Metro and outside Metro, request a signed statement from your employer 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.