2023 TAX ORGANIZER & DEDUCTION FINDER (BOLD is new) Taxpayer (T)	Marino and Associates, Inc PO Box 66512 Portland, OR 97290 503-239-4716 www.MarinoTaxPro.com
Spouse (S)	V 2023
print sign	V 2020
FIRST STEP – MUST BE MARKED "YES OR NO" Yes or No. Do you have a new 2024 IP PIN? (Identify Protection PIN Yes or No. Any Foreign Investment Accounts? Foreign Assets or Real Yes or No. At any time during 2023, did you receive (as a rewarroperty or services), sell, exchange, or otherwise dispose of a dinterest in any virtual currency)?	Éstate? (WORLDWIDE income)
THINGS TO SEND 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 an 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? Received SSA-1099 (social security compensation), 0ther 1099 forms 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 Real estate taxes paid	ons, fees, etc.) e form 1099-K?
QUESTIONS ("you" means you or your spouse) Check one or more: □ On Dec.31 st , were you not married (never married or	or legally divorced)?
☐ Are you married to each other? ☐ Are you a widow(er) ☐ Are you ☐ Are you a Registered Oregon Domestic Partner	
☐ Any change in your marital status, dependents, address, or telephone nur ☐ Anyone else living in your home, or address, or you support? List their nar	
□ If married, do either taxpayer or spouse, choose to file a separate tax retu □ Did you have any children under age 19 or full-time students under income in excess of \$1250? □ 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 investre □ Did you receive or pay any alimony? Divorce papers needed for deduction □ Did you pay childcare expenses? Provider name, address, EIN, phone nu □ Did you receive any tips or gratuities? □ Did you file or plan to file for bankru □ Do you have any forgiven income? □ Did you file or plan to file for bankru □ Do you have any self-employment or business income? □ Were you a Ub □ Do you have rent income? □ Did you collect income from AirBnB (or or ot □ Does your employer have an incentive stock option, stock purchase plan on □ Do you have any other income? (Jury duty, "under the table", prizes, awar □ Did you receive any correspondence from IRS. Oregen Department of Potential Does of □ Does your paper any correspondence from IRS. Oregen Department of Potential Does you payed any correspondence from IRS. Oregen Department of Potential Does you payed any correspondence from IRS. Oregen Department of Potential Does you payed any correspondence from IRS. Oregen Department of Potential Does you payed any correspondence from IRS. Oregen Department of Potential Does you payed you payed any correspondence from IRS. Oregen Department of Potential Does you payed you pa	age 24, with total investment MPLE, or Coverdell plan? Imm distribution? IRA? Need Form 1098-T nents or assets? n. mber modations? ptcy? per driver (or similar)? her shared housing)? or other similar plan?
□ Did you receive any correspondence from IRS, Oregon Department of Re □ Did you gift more than \$17,000 to someone? (\$18,000 for 2024)	venue or other taxing authority?

 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
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

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 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

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.