

Taxpayer (T) \_\_\_\_\_

Spouse (S) \_\_\_\_\_  
print sign

V 2024A

**FIRST STEP – ALL MUST BE MARKED “YES OR NO”**

- Yes** or  **No**. Do you have a new **2025** IP PIN? (Identify Protection PIN). T \_\_\_\_\_ S \_\_\_\_\_
- Yes** or  **No**. Any Foreign Investment Accounts? Foreign Assets or Real Estate? (WORLDWIDE income)
- Yes** or  **No**. At any time during 2024, did you receive (as a reward, award, or payment for property or services), sell, exchange, or otherwise dispose of a digital asset (or financial interest in any virtual currency)?
- Yes** or  **No**. Does your LLC or Corporation have a beneficial ownership reporting requirement? Did you report?  **Yes** or  **No**

**A. 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 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 (commissions, fees, etc.)  1099-DA
- 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, 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 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.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 **\$1300**?
  - 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 for deduction.
  - Did you pay childcare expenses? Provider name, address, EIN, phone number
  - Did you receive any tips or gratuities?
  - 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, stock purchase plan or other similar 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, Oregon Department of Revenue or other taxing authority?
- Did you gift more than **\$18,000** to someone? (**\$19,000 for 2025**)
- 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 2022? Form 1095-A  
**We do not need form 1095-B or form 1095-C.. Only 1095-A. Except for CA residents.**

### 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
- Are you reimbursed for any medical expenses? Example, Medicare**

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
- 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:**

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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 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.

**OTHER ISSUES. What should we talk about to reduce your current or future taxes?**

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